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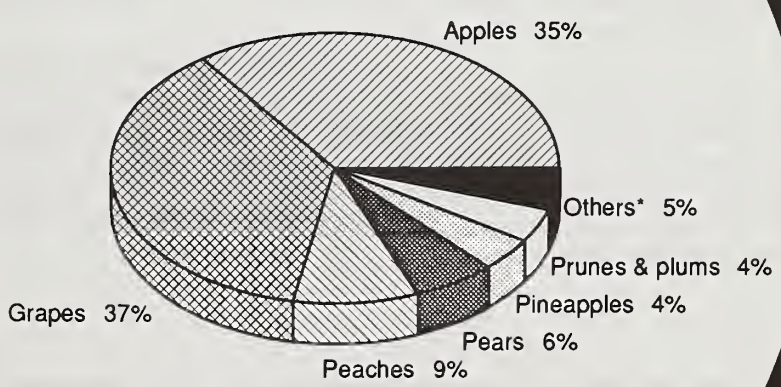
Fruit and Tree Nuts

AUG 30 REC'D

Situation and Outlook Report

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**Apples and Grapes Make Up 72 Percent
of 1993 Noncitrus Output**



15.4 million short tons

*Includes cherries, nectarines, olives and apricots.

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Summary

Increased production, lower fresh-market apple exports, and higher stocks resulting from sluggish domestic demand in 1992/93 pressured grower prices down 25 percent from 1991/92. Another record-large U.S. apple crop in 1993 is expected to keep downward pressure on apple prices. During the first 6 months of 1993, grower prices for apples averaged one-third less and retail prices were about 10 percent less than in the same period in 1992.

The 1993 California grape crop is forecast down 8 percent from 1992, 4 percent less than the most recent 5-year production average. Increased grape output in other States will not offset the decline in California, so total U.S. grape production is forecast down 7 percent in 1993. Competition from plentiful supplies of other fresh-market fruits contributed to lower grape prices in 1992. A smaller grape crop, combined with increased demand for wine, will strengthen prices in 1993.

The 1993 pear crop is forecast up 2 percent from 1992 and 5 percent more than in 1991. U.S. production of other-than-Bartlett pear varieties is forecast up 9 percent from 1992. California's output of Bartlett pears, which are mainly processed, is forecast down 2 percent from 1992. Increased supplies of apples, as well as pears, point toward lower pear prices in 1993/94.

Lower production and later crop maturity led to decreased shipment volumes and higher early-season f.o.b. prices for California peaches, plums, and sweet cherries. Plum and sweet cherry prices are expected to stay up because total output of both crops is forecast down about 20 percent from 1992. Although the California Freestone peach crop is expected to be 2 percent smaller, increased production in other States will lower peach prices. Total U.S. peach production in 1993 is forecast up 4 percent from 1992.

The 1993 California olive crop is forecast down 30 percent from the 1992 crop. A smaller olive crop implies a reduced pack, lower olive inventory, and higher prices. California produced a record-large kiwifruit crop in 1992, and grower prices plummeted. In calendar year 1992, U.S. kiwifruit consumption and exports rose; imports fell 30 percent from 1991.

Increased imports raised the U.S. banana supply to a 20-year high in 1992 and lowered retail prices. Banana consumption is likely to remain high in 1993. More Latin American bananas are expected to be diverted from European markets to the United States as a result of the European Community's new banana-import regime. A sharp drop in Florida mango output was met with increased imports from Mexico. Fresh papaya consumption rose with a large Hawaiian crop and increased imports from Mexico. Imports of processed pineapple products from Thailand and the Philippines and fresh pineapple from Central America raised total U.S. pineapple consumption in 1992.

U.S. production of cultivated blueberries is expected to be up, as Michigan and New Jersey recover from freeze-reduced outputs in 1992. Large stocks of frozen berries and larger 1993 crops will dampen blueberry prices. An increase in 1993 California strawberry production is expected to more than offset a decline in Florida's output and keep prices down in 1993.

California almond output is forecast down 14 percent from 1992. Low ending stocks and output will keep almond prices up in 1993, while a 23-percent increase in walnut production will replenish supplies and lower prices.

The 1992/93 U.S. orange crop is expected to be the largest since 1979/80 and 24 percent greater than 1991/92 production. A large navel orange crop in California led to a plentiful supply of fresh-market oranges, while more Florida oranges boosted the supply of orange juice. Fresh-market orange quality has been good and Florida juice yields were record high in 1992/93. However, large U.S. supplies dropped grower and retail prices for fresh-market and processed oranges. Lower retail prices for orange juice increased movement. Orange juice futures prices rose from a 16-year low in February 1993.

The 1992/93 U.S. grapefruit crop is expected to be up 26 percent from 1991/92. Florida's crop was 30 percent larger, accounting for 82 percent of U.S. grapefruit production. California's projected grapefruit production is 5 percent less than in 1991/92. U.S.-average grower prices for all grapefruit fell in 1993 to levels last seen in the early 1980's.

Fruit Prices Down

Large apple and orange crops lowered grower and consumer prices in 1992 and during the first half of 1993. Ample harvests of most noncitrus fruits expected this summer will keep 1993/94 fruit prices down.

Big Crops Bring Lower Grower Prices

The grower price index for all fruit (fresh and processed uses) has been below year-earlier levels since April 1992. Monthly indexes estimated between June 1992 and July 1993 were the lowest in 5 years when grower prices for apples and oranges dropped as record- and near-record-large crops were harvested.

In the summer of 1992, grower price indexes reflected low prices of California Valencia oranges due to an unusually large crop of below-normal quality. Harvest of a record-large U.S. apple crop later that year started apple prices downward, and, since October 1992, grower prices for fresh-market apples have been below year-earlier levels. The 1992/93 season-average apple price was down 25 percent from 1991/92 and 8 percent less than in 1990/91.

Low prices for processed oranges were a major contributor to the decline of the grower fruit-price index late in 1992 and during the first half of 1993. Florida produced its largest orange crop since 1979/80 and, typically, most of it was processed. From November 1992 through June 1993, Florida processed-orange prices were down 50-75 percent from the year earlier.

No Price Rebound Anticipated

Grower price indexes for fruit (1982=100) were especially low from January through June 1993, averaging 137 compared to 206 during the same months in 1992, and the lowest monthly estimates since 1983. Preliminary U.S. all-orange prices averaged \$2.98 a box (on-tree equivalent) compared to \$6.23 during the first 6 months of 1992.

Prices for processing oranges rose in the spring of 1993 as usual with harvest of Florida Valencia oranges. Prices of California Valencia oranges that dominate summer citrus marketings have also been higher than in 1992 because of a smaller crop and better fruit quality. The July all-orange price rose to \$4.10 a box. Although California Valencia output was forecast down 22 percent from 1992, there are adequate supplies for summer demand and significantly higher orange prices are not anticipated.

January-June 1993 grower prices for apples averaged 33 percent less than in the same period in 1992. Prices of several summer fruits were up sharply from a year ago, as cool, wet weather delayed or reduced harvests of cherries, nectarines, apricots, and plums. However, forecasts of another record-large apple harvest in 1993, as well as gains in peach and pear production, will keep downward pressure on grower prices for these fruits.

Consumers Pay Less for Fruit

The Consumer Price Index for fresh fruit averaged 6 percent lower in 1992 than 1991, reflecting mainly lower fresh-orange prices. There was a shortage of fresh-market oranges in 1991 following severe freezes in December 1990 that damaged California citrus. Retail prices for navel oranges averaged 58.6 cents a pound in 1992, down 20 cents from the 1991 average, and Valencia oranges cost just 56 cents a pound in 1992, compared to an average of 92.5 cents in 1991. A 25 percent larger California navel orange crop brought retail prices down to an average of 53 cents a pound in 1992/93.

Apple prices remained relatively high until late in 1992. Retail prices for Red Delicious apples averaged 89.0 cents a pound in 1992, 88.5 cents in 1991, and 71.9 cents in 1990. However, as more of the large 1992 crop was marketed, apple prices declined and in January-June 1993, Red Delicious prices averaged 81.4 cents, down 10 cents from the same period in 1992.

The Consumer Price Index for frozen fruit and fruit juice was up 4 percent in 1992 from 1991, and was almost as high as in 1990, when orange juice prices rose following a freeze in Florida. Retail prices for frozen concentrate orange juice averaged \$2.15 a pound in 1990, \$1.84 in 1991, and \$1.89 in 1992.

A large Florida orange crop and increased juice production brought 1993 monthly retail prices down to 4-year lows. Retail orange juice concentrate prices averaged \$1.64 a pound in January-June 1993, 30 cents less than in 1992. Adequate stocks of orange juice will keep prices below year-earlier levels, but retail prices are likely to advance in line with increased wholesale prices since the spring of 1993.

Table 1--U.S. monthly-average-price indexes for fruits, selected months, 1992-93

Items	1992						1993						
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
--1982=100--													
Index of all fruit prices received by growers 1/	83	90	89	87	95	93	83	78	67	76	81	83	81
Producer Price Index:													
Fresh fruits--	70.8	78.6	73.4	79.3	91.3	85.0	80.0	78.7	74.2	73.3	89.9	82.3	79.5
Citrus fruits	94.6	97.7	102.4	107.1	83.8	83.2	79.9	87.5	84.1	93.2	100.1	112.5	123.2
Other fruits	65.4	75.6	66.4	65.3	91.1	82.2	76.0	71.4	66.1	61.4	82.0	73.6	66.2
Canned fruit and juices--	135.7	135.5	133.3	132.1	130.9	129.8	128.0	127.5	125.8	124.5	124.3	124.4	125.7
Canned fruits	132.8	132.8	129.0	126.7	128.3	128.2	127.2	128.1	128.3	126.3	125.8	126.1	126.8
Canned fruit juices	139.2	138.9	137.8	137.2	134.2	132.4	130.0	128.6	125.6	124.7	124.8	124.8	126.5
Frozen fruits and juices--	123.7	123.1	121.7	118.2	116.9	113.1	108.6	105.8	104.6	104.6	105.8	112.4	117.0
Frozen fruits	113.2	113.2	111.7	111.7	111.6	111.6	112.7	112.7	114.2	--	116.3	--	116.0
Frozen juices	124.9	124.2	122.8	118.6	117.1	112.8	107.2	103.9	102.2	102.3	103.3	111.1	116.4
Dried fruits	114.5	114.2	113.9	114.7	114.8	115.1	116.3	115.7	116.4	115.8	115.9	115.5	117.1
Consumer Price Index: --1982-84=100--													
Fresh fruits	173.3	181.4	189.2	182.1	181.4	181.8	191.0	187.0	184.4	184.6	188.0	176.1	178.7
Processed fruits	138.4	138.2	138.0	136.4	135.5	134.8	133.3	134.5	132.0	132.1	130.7	129.7	131.0
Fruit juices and frozen fruits	139.6	139.3	139.2	137.3	136.4	135.3	133.2	134.5	131.5	131.5	129.4	128.0	129.6
Canned and dried fruits	131.9	132.2	131.8	131.3	130.4	130.7	131.9	132.3	131.9	132.3	133.1	133.5	134.3

-- = Not available.

1/ Index for fresh and processed.

Sources: Bureau of Labor Statistics, U.S. Department of Labor and Economic Research Service, USDA.

Figure 1

Fresh Fruit: Consumer Price Index

% of 1982-84

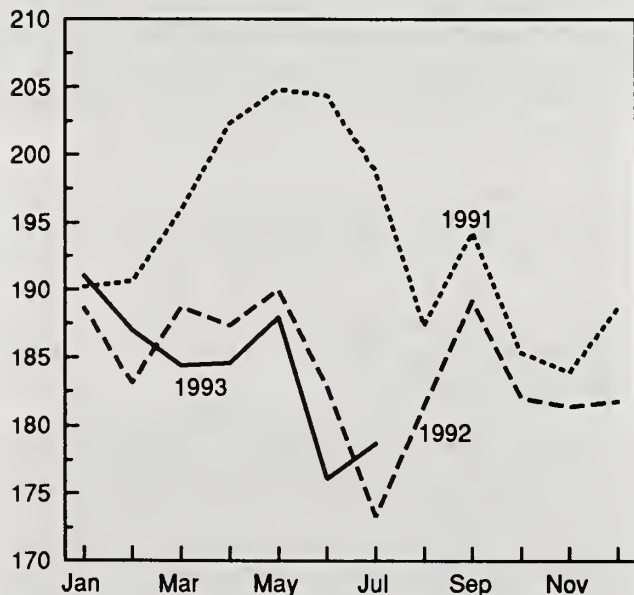
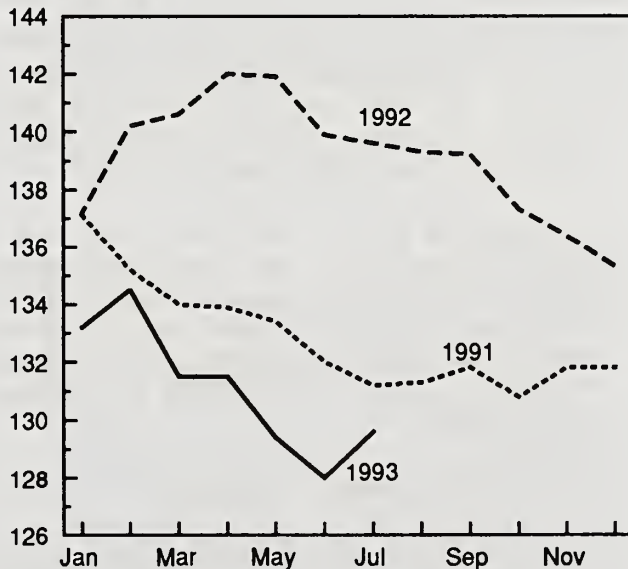


Figure 2

Frozen Fruit and Juice: Consumer Price Index

% of 1982-84



Apple Production Forecast Record-High

Production gains in the Central and Western States are expected to more than offset a decline in Eastern States apple production in 1993. Another record-large U.S. apple crop is expected to keep downward pressure on apple prices.

U.S Apple Output Forecast Up 1 Percent in 1993

USDA's August forecast of 1993 U.S. apple production was 5.4 million short tons, up less than 1 percent from 1992 and 11 percent greater than in 1990 and 1991. The Washington apple crop forecast was 2.4 million tons, the same as in 1992. Forecasts indicated apple production declines in New York and Maine and increases in California, Michigan, and Pennsylvania. Production of another record-large apple crop is expected to keep grower and retail prices at their current low levels through 1993.

Apple production in the Western States is expected to be 3.1 million tons in 1993, up slightly from 1992's large crop. Declines in Oregon, Colorado, Arizona, and Utah are offset by larger crops in California and Idaho. Freezing temperatures and hail limited the crop in Colorado, New Mexico, and Utah. However, Washington will continue to provide 43-45 percent of the U.S. apple crop, as in the prior 2 years.

Apple crops in the Eastern States are expected to decrease 1 percent overall, to 1.5 million short tons. Some winter damage was reported and large 1992 crops probably limited the fruit set and size in the Northeast. The New York apple production forecast for 1993 is 510,000 tons, down 13 percent from a year earlier, while the Pennsylvania crop is expected to be 275,000 tons, up 10 percent from 1992.

Extremely hot and dry conditions, especially in the Southeast, may lower production prospects as the summer progresses. However, the August forecast indicated a slightly larger Virginia apple crop, while North Carolina's forecast was 33 percent larger than the 1992 crop.

Apple production in the Central States is forecast up 5 percent in 1993, to 810,750 tons. Heavy rains and cool temperatures in Iowa, Minnesota, and Wisconsin were the probable cause of smaller 1993 apple crops. Production declines in those States are more than offset by increases in Michigan (up 2 percent to 550,000 tons), Illinois, Indiana, and Ohio.

Low Apple Prices Likely To Continue

Increased production, lower fresh-market apple exports, and higher stocks due to sluggish domestic demand in 1992/93 pressured grower prices downward from the relatively high prices of the two previous seasons. The

1992/93 season-average grower price for apples was 13.4 cents a pound, down 25 percent from 1991/92. Apple prices during the first 6 months of 1993 averaged one-third less than in the same period in 1992. At the same time, retail prices were down about 10 cents a pound from an average of \$0.91 a pound a year earlier.

Higher-than-normal stocks helped dampen prices as more apples were available through the start of the new crop harvest. According to the International Apple Institute, total apples in storage in the United States as of July 1, 1993, was up 36 percent from July 1, 1992, and 29 percent above the 5-year average. Stocks of apples for fresh shipments and for processing were up 32 and 51 percent, respectively, from the year earlier.

Apple Exports to Europe Are Down

Exports of the record-large 1992 U.S. apple crop were off slightly from the previous season because of reduced exports to the European Community (EC). In 1991/92, U.S. apple exports to the EC were record high due to a freeze-reduced European apple crop. U.S. exports of fresh-market apples from July 1992 through May 1993 totaled 506,127 short tons, down 5 percent from the same period in 1991/92.

While apple exports to the EC were off 75 percent from the previous year, exports to Taiwan and Mexico increased 48 and 46 percent, respectively. Taiwan received 24 percent of U.S. apple exports during that period, followed by Mexico and Canada with 17-18 percent each.

U.S. imports of fresh-market apples, from July 1992 through May 1993, totaled 100,204 tons, 23 percent less than in the same period a year earlier. Nearly 50 percent of U.S. apple imports came from Canada and 20-25 percent from New Zealand in the last two years. Apple imports from both countries were down in 1992/93 from the previous year.

Apple juice imports also declined in the past year. From July 1992 through May 1993, total U.S. imports of apple juice were down 5 percent from the same period in 1991/92. While U.S. fresh-apple imports are fairly insignificant compared to total U.S. supplies, apple juice imports typically provide half of supplies. Argentina and Germany have been major sources of apple juice, with each providing about a fourth of U.S. imports in 1992/93.

Figure 3

U.S. Apple Utilization

Million pounds

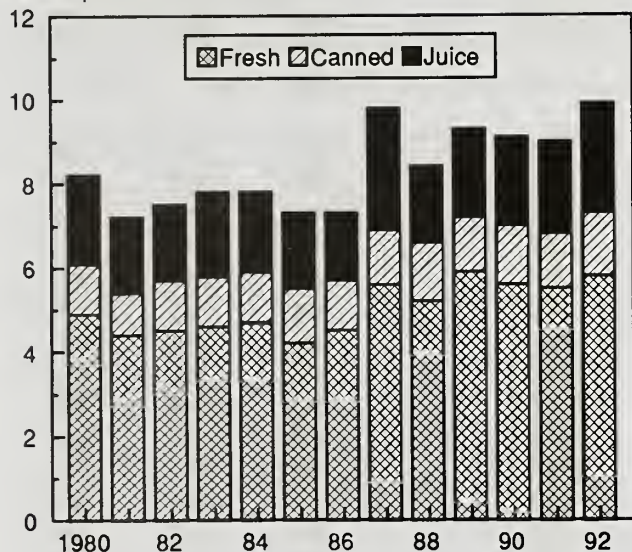


Figure 5

U.S. Grower Prices for Fresh Apples

\$/pound

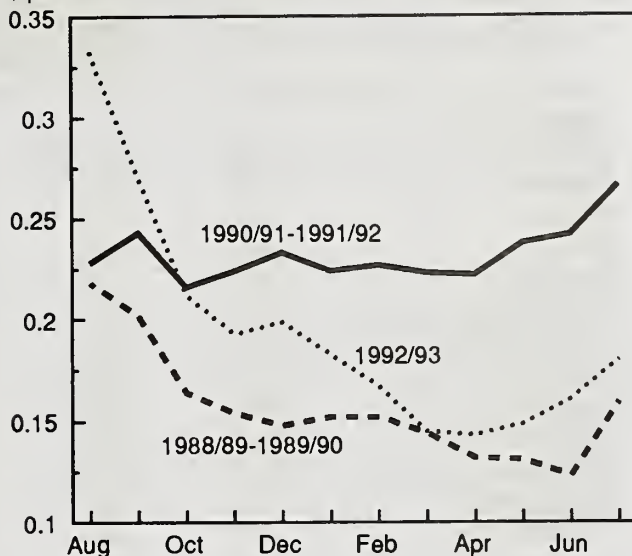


Figure 4

U.S. Fresh-Market Apple Supply and Use

Million pounds

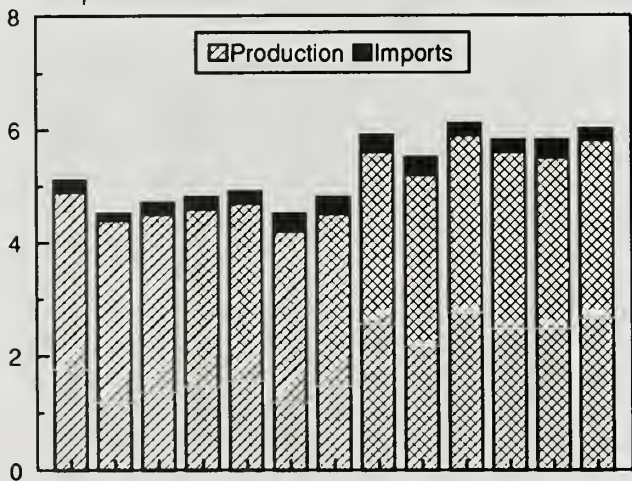


Figure 6

U.S. Apple Juice Supply and Use

Million gallons

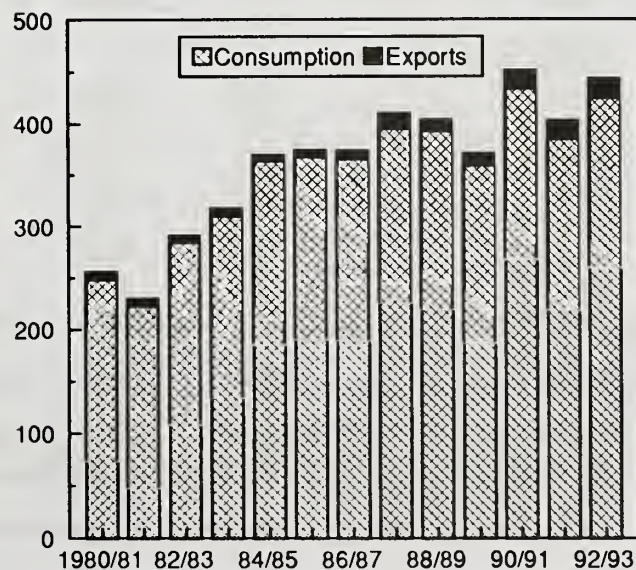
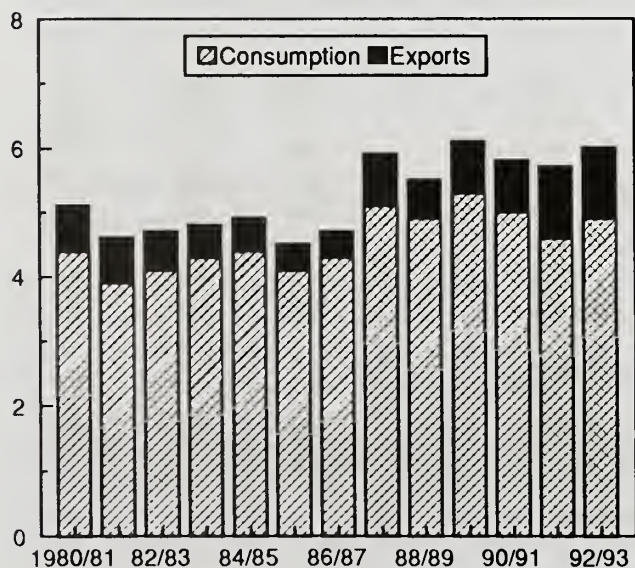


Table 2--Apples, commercial crop 1/: Total production and season-average price received by growers, 1990-92 and indicated 1993 production

State and area	Production 2/				Price per short ton		
	1990	1991	1992	1993	1990	1991	1992
-- 1,000 short tons --				-- Dollars --			
Eastern States:							
Connecticut	16.5	13.5	21.0	17.0	528	546	432
Delaware	8.5	12.5	10.0	10.0	232	218	188
Georgia	11.0	16.0	12.5	17.5	264	272	374
Maine	44.0	34.0	41.5	36.5	448	458	320
Maryland	16.5	21.0	25.0	22.0	274	298	202
Massachusetts	42.5	31.0	42.5	35.0	478	508	326
New Hampshire	24.0	20.0	27.0	22.0	484	474	340
New Jersey	30.0	46.0	27.5	42.5	260	332	270
New York	495.0	525.0	585.0	510.0	258	254	198
North Carolina	115.0	130.0	120.0	160.0	200	178	150
Pennsylvania	225.0	235.0	250.0	275.0	284	204	172
Rhode Island	3.0	2.8	3.3	2.8	516	578	554
South Carolina	17.0	20.0	30.0	30.0	254	198	258
Vermont	21.5	26.5	25.0	23.5	426	434	238
Virginia	105.0	210.0	185.0	190.0	202	218	172
West Virginia	75.0	100.0	112.5	107.5	192	198	166
Total	1,249.5	1,443.3	1,517.8	1,501.3			
Central States:							
Arkansas	6.0	5.0	4.0	5.5	382	338	252
Illinois	30.0	34.5	44.0	47.5	350	348	400
Indiana	28.5	30.0	35.0	40.0	400	428	326
Iowa	4.8	4.0	6.8	5.5	442	580	466
Kansas	4.0	3.8	3.0	5.0	430	472	494
Kentucky	4.5	10.0	8.0	11.0	410	442	444
Michigan	375.0	440.0	540.0	550.0	206	218	170
Minnesota	10.0	12.7	14.5	14.0	748	858	740
Missouri	20.5	20.0	18.5	25.0	338	416	396
Ohio	60.0	60.0	57.5	70.0	348	470	404
Tennessee	4.3	6.5	6.5	7.8	358	308	352
Wisconsin	24.0	30.0	31.5	29.5	500	416	450
Total	571.5	656.5	769.3	810.8			
Western States:							
Arizona	32.0	28.5	45.0	31.5	160	282	166
California	390.0	400.0	420.0	425.0	312	420	406
Colorado	17.5	37.5	45.0	44.0	294	312	290
Idaho	82.5	60.0	37.5	75.0	270	386	324
New Mexico	3.4	1.2	7.5	3.5	358	452	338
Oregon	90.0	60.0	87.5	77.5	224	372	206
Utah	12.0	27.5	30.0	26.0	376	360	258
Washington	2,400.0	2,150.0	2,400.0	2,400.0	328	440	296
Total	3,027.4	2,764.7	3,072.5	3,082.5			
United States	4,848.4	4,864.4	5,359.5	5,394.5	302	358	268

1/ In orchards of 100-or-more bearing-age trees. 2/ Includes unharvested production and harvested not sold (1,000 short tons) 1990, 19.3; 1991, 35.0; and 1992, 52.6.

Sources: National Agricultural Statistics Service and Economic Research Service, USDA.

Fewer California Grapes Expected in 1993

Increased grape output in other States is not expected to offset a decline in California's 1993 grape production. A 7-percent reduction in total U.S. grape production will likely bring higher prices.

California grape production is forecast at 5.0 million short tons in 1993, down 8 percent from 1992, and 4 percent less than the most recent 5-year- average output. Production of wine-type grapes is expected to increase 3 percent from 1992, to 2.2 million short tons. That increase is more than offset by an 18-percent drop in raisin-type grape output from 1992's large crop and a 7-percent lower table grape forecast. Reduced production and strong wine demand will likely boost grape prices in 1993.

Grape crop forecasts in other States total 629,800 tons, 6 percent more than 1992. USDA reports grape production for 12 States, other than California, that typically account for about 10 percent of U.S. grape production. Because California is the major grape producer, the total U.S. grape production forecast is down 7 percent from 1992. About three-fourths of the other States' production is Concord grapes that are used for juice, jams and jellies, and wine.

Washington's grape crop is expected to be later in maturing and of higher quality than in 1992, with production up 34 percent. Michigan's grape crop forecast is 17 percent higher than 1992's freeze-reduced crop. Grape production in New York is expected to be down 22 percent and down 17 percent in Pennsylvania due to vines bearing fewer and smaller berry clusters.

In California, a cool spring and out-of-season rain in June that caused some mildew problems was followed by hot weather, bringing burn and heat stress. Cool weather delayed the early harvest in the Coachella Valley of California, but by the end of June shipments of fresh-market grapes were ahead of last year. Early August was the peak harvest period in central California. Some areas will harvest through October, with shipments from storage through December. Despite some weather-related problems, quality has been good and the industry projected the final 1993 pack-out of fresh-market grapes to be up 2 percent from 1992.

Grower Prices Drop for Fresh Grapes in 1992, Rise for Wine Grapes

Fresh utilization of all U.S.-produced grapes was 771,970 short tons in 1992, down nearly 4 percent from 1991. Most California grapes used fresh were table varieties, 55 percent, 39 percent were raisin-type grapes, and 6 percent were wine grapes. Despite tighter supplies in 1992, U.S. grower prices for fresh-market grapes averaged \$425 a ton, 23 percent lower than in 1991. Competition from plentiful supplies of other fresh-market fruits contributed to lower

grape prices in 1992. A smaller grape crop, combined with increased demand for wine, will strengthen prices in 1993.

Processing accounted for 87 percent of utilized grape production in 1992, about the same as the 5-year average, 86 percent. Processed grape utilization increased to 5.26 million tons in 1992, up 11 percent from 1991. More than 60 percent, 3.24 million tons of grapes were crushed, an increase of nearly 20 percent from 1991. Dried utilization dipped less than 1 percent in 1992 from 1991. Nearly all grapes used for raisins are raisin varieties (such as Muscats and Thompsons), 99 percent in the last 3 years.

Although some table- or raisin-type grapes are crushed, amounts had declined significantly since 1986. In California, wine-grape varieties were over 80 percent of the crush in 1990 and 1991, but only 68 percent in 1992. In 1992, 29 percent of California's raisin-type grapes were crushed, compared to 13 percent in 1991 and 11 percent in 1990.

Strong demand for wine and juice resulted in increased utilization and higher prices for processed grapes in 1992. Grower prices of all processing grapes averaged \$285 a ton in 1992, up 4 percent from 1991. Grower prices for all grapes used for wine averaged \$331 a ton, up 5 percent from 1991. Grower prices for all grapes dried averaged \$212 a ton in 1992, the same as in 1991.

Grape Exports and Consumption Down in 1992/93

Because a 4-percent reduction in fresh utilization of U.S.-produced grapes was accompanied by lower exports and slightly more imports, 1992/93 grape consumption dipped just 1 percent from the year earlier. USDA estimated 1992/93 (July-June) fresh-market grape consumption at 7.16 pounds per capita, compared to 7.26 pounds in 1991/92. The record-high was 7.94 pounds in 1989/90. Grape imports, mainly from Chile, usually provide 30 percent of U.S. supplies. Chilean grapes arrive mostly from January through April, during California's off-season. U.S. fresh grape imports totaled 350,300 short tons in 1992/93, up about 1 percent from the year earlier.

The United States exported 206,300 tons of fresh-market grapes in 1992/93, a 5-percent decline from the year earlier. Exports to Canada, Hong Kong, and the EC were down, while exports to Taiwan increased. Canada remained the major destination, receiving more than half of U.S. grape exports in 1992/93, while 8 percent went to growing markets in Hong Kong and Taiwan.

U.S. Wine Production and Consumption Up

California is the dominant wine-producing State, accounting for about 90 percent of U.S. wine production during 1987-91. Other important producing States include New York, Washington, and South Carolina. An increase in imports in 1992 swamped the effects of lower domestic wine production and higher exports to raise wine consumption for the first time in 5 years.

According to Wine Institute data, total wine consumption rose nearly 2 percent in 1992. However, because population growth was more than 1 percent, average consumption increased slightly, from 1.85 gallons per capita in 1991 to 1.86 in 1992. U.S. wine imports increased for the first time in 7 years, climbing about 15 percent to 71 million gallons in 1992. U.S. wine exports continued an 8-year upward trend in 1992, rising nearly 20 percent to 37 million gallons.

Starting in the mid-1980's, the wine industry faced a decline in overall U.S. per capita consumption. Consumer preference shifted from wine coolers and generic jug wines to better quality, higher value, varietal wines (such as Chardonnay, Cabernet Sauvignon, and Zinfandel); thus, the value of consumption has declined less than the volume.

In November 1991, the television program "60 Minutes" reported a correlation between moderate wine consumption and a low incidence of heart disease. The positive media publicity that followed the broadcast had a definite, positive effect on the table-wine market that seems to have continued. The downward trend of U.S. wine consumption may be leveling out. However, the import surge that was responsible for higher consumption in 1992 may have resulted from a threat of higher tariffs on EC wine. Imports rose as buyers tried to make purchases before a price increase would take effect. Tariffs were not raised, but the issue was not resolved until December 1992.

Raisin Consumption Declines

USDA estimated the tonnage of grapes used to make raisins in 1992 was down less than 1 percent from the prior year, and grower prices were stable. According to the industry, total domestic shipments of all raisins were down 5 percent from 712 million pounds in 1991/92 to 679 million pounds in 1992/93 (August-July). Exports were also down from the prior year, from 247 to 233 million pounds. USDA's preliminary estimate of 1992/93 consumption is 1.8 pounds per capita, down from nearly 2 pounds a year earlier and the lowest consumption estimate in 8 years.

For more information about the U.S. wine industry, including distribution channels and regulations, foreign wine production, and trade issues, see "Industry and Trade Summary: Wine and Certain Fermented Beverages," U.S. International Trade Commission, Publication 2639, June 1993. To obtain a copy of the publication, write to the Office of Industries, U.S. International Trade Commission, Washington, DC 20436.

Figure 7

U.S. Fresh Grape Consumption

Pounds per capita

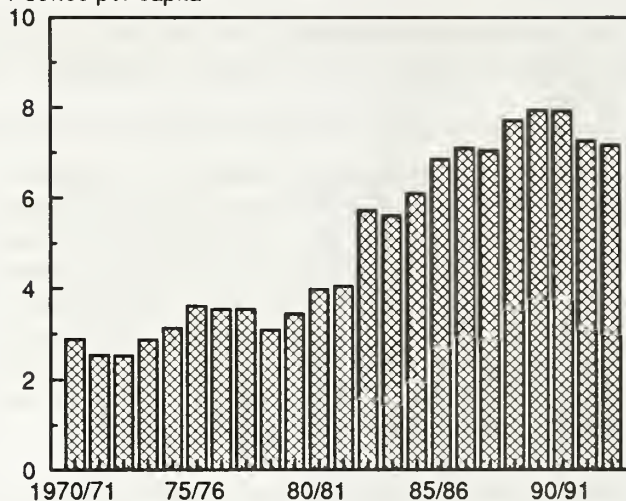


Figure 8

U.S. Wine Consumption

Gallons per capita

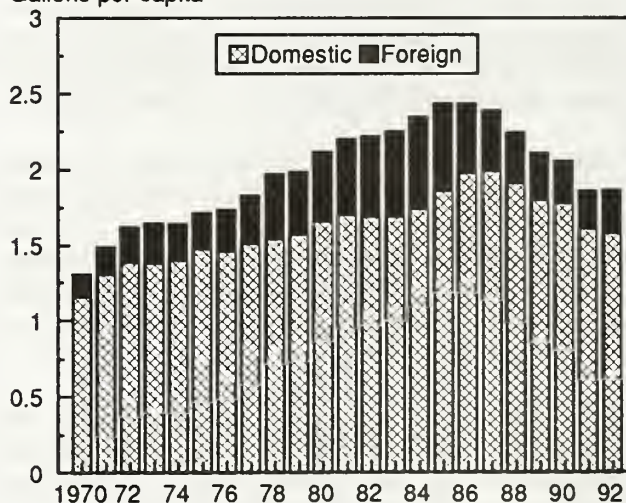


Figure 9

U.S. Raisin Consumption

Pounds per capita

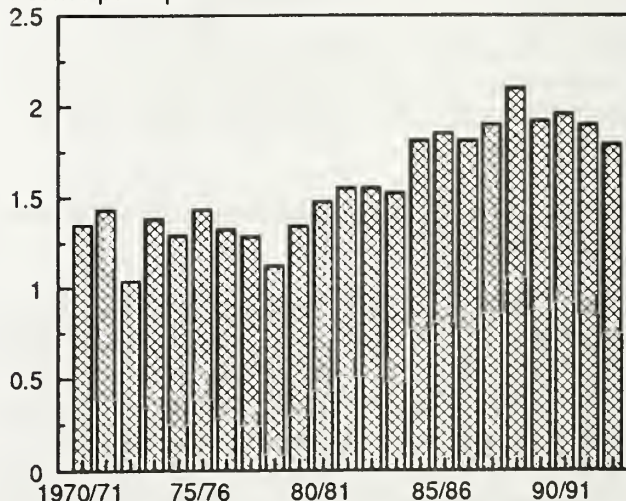


Table 3--Grapes: Total production and season-average price received by growers in principal States, 1990-92 and indicated 1993 production

States	Production 1/				Price per short ton		
	1990	1991	1992	1993	1990	1991	1992
	-- 1,000 short tons --				-- Dollars per ton --		
Arizona	26.0	25.0	25.0	21.5	870	787	500
Arkansas	5.1	11.0	5.0	12.5	327	313	518
Georgia	2.9	3.2	3.4	3.0	777	811	848
Michigan	46.0	46.0	47.0	55.0	291	281	231
Missouri	1.3	3.1	1.9	2.7	378	356	408
New York	144.0	192.0	180.0	140.0	286	254	225
North Carolina	1.5	2.2	1.3	2.0	533	611	780
Ohio	7.7	9.1	10.3	8.5	304	275	265
Oregon	7.0	9.6	12.3	14.0	780	840	790
Pennsylvania	53.0	78.0	78.0	65.0	285	229	198
South Carolina	0.4	0.7	0.5	0.6	803	530	1070
Washington	180.0	196.0	227.0	305.0	316	279	294
Total 2/	474.9	575.9	591.7	629.8			
California:							
Wine	2,195	2,195	2,145	2,200	308	344	393
Table	645	620	645	600	429	438	356
Raisin 3/	2,345	2,165	2,670	2,200	237	247	221
All	5,185	4,980	5,460	5,000	291	314	305
United States	5,660	5,556	6,052	5,630	295	312	303

1/ Includes unharvested production and harvested not sold (tons): 1990, 120; 1991, 630; and 1992, 450. 2/ Some figures may not add due to rounding. 3/ Fresh basis.

Sources: National Agricultural Statistics Service and Economic Research Service, USDA.

More Fresh Pears in 1993, but Fewer for Processing

U.S. production of other-than-Bartlett pear varieties is forecast up 8 percent from 1992. California's output of Bartlett pears, which are mainly processed, is forecast down 2 percent from 1992. Lower pear prices are expected.

U.S. Output of All Pears Forecast Up in 1993

The U.S. pear production forecast for 1993 is 945,300 short tons, up 2 percent from 1992 and 5 percent more than 1991. Production of varieties other-than Bartlett is expected to increase 17 percent in Washington and 4 percent in Oregon in 1993. Typically, at least 85 percent of other-than-Bartlett pears are for fresh use. Increased supplies of apples, as well as pears, indicate lower prices for fresh-market pears in 1993.

Bartlett pear production in California and Oregon is expected to decline, with Washington unchanged from 1992. The three state forecasts total 548,000 short tons, down 2 percent from 1992, but 3 percent more than in 1991. Bartlett pears from these three States were 60 percent of total U.S. pear production in the last 3 years. About 75 percent of U.S. Bartlett pear production is usually processed, with the balance being fresh marketed during the summer. Given the overall increase of pear production, grower prices for processing pears are expected to be down in 1993.

Pear Production Up in Washington, But Down in Most States

The 1993 California Bartlett pear crop forecast is 310,000 tons, down slightly from 1992. Fruit maturity was delayed slightly by cool and wet weather in May. Also picking began in mid-July, later than normal. California produces mainly Bartlett pears, but output of other varieties is expected to be 23,000 tons, the same as in 1992. In July 1993, the California Pear Advisory Board projected the total 1993 tonnage of Bartlett pears down 5 percent from 1992 and fresh shipments of Bartletts down 3 percent.

The 1993 Washington Bartlett pear crop matured 3 weeks later than usual, but with no frost damage, a good-quality crop is expected, with production totaling the same as in 1992, 170,000 tons. Other pear varieties that provide fall and winter fruit are expected to total 195,000 tons in 1993, up 17 percent from 1992 and 11 percent from 1991. Total 1993 pear output in Washington is expected to be up 8 percent from the previous year.

Table 4--Pears: Total production and season-average price received by growers, by State and Pacific Coast, variety comparison, 1990-92 and indicated 1993 production

State and area	Production 1/				Price per short ton		
	1990	1991	1992	1993	1990	1991	1992
	-- 1,000 short tons --				-- Dollars --		
California	332.0	317.0	338.0	333.0	251	263	246
Colorado	2.5	3.1	4.0	4.0	336	298	284
Connecticut	1.1	1.2	1.3	1.3	550	600	650
Michigan	2.5	5.0	6.0	5.0	267	273	236
New York	14.6	14.5	18.5	17.0	253	275	308
Oregon	233.0	220.0	214.0	213.0	266	301	312
Pennsylvania	3.3	4.6	5.5	5.2	356	418	402
Utah	2.8	2.2	1.8	1.8	380	440	400
Washington	372.0	336.0	337.0	365.0	312	341	332
United States	963.8	903.6	926.1	945.3	280	303	296
Pacific Coast:							
California--							
Bartlett	314.0	300.0	315.0	310.0	242	252	238
Other	18.0	17.0	23.0	23.0	410	458	356
Total	332.0	317.0	338.0	333.0	251	263	246
Oregon--							
Bartlett	83.0	70.0	74.0	68.0	244	272	265
Other	150.0	150.0	140.0	145.0	279	314	337
Total	233.0	220.0	214.0	213.0	266	301	312
Washington--							
Bartlett	177.0	160.0	170.0	170.0	248	270	272
Other	195.0	176.0	167.0	195.0	371	405	393
Total	372.0	336.0	337.0	365.0	312	341	332
3 States 2/--							
Bartlett	574.0	530.0	559.0	548.0	244	260	252
Other	363.0	343.0	330.0	363.0	335	368	367
Total	937.0	873.0	889.0	911.0			

1/ Includes unharvested production and harvested not sold (tons): 1990, 150; 1991, 150; and 1992, 1,950. 2/ Separate data by type not available for other states.

Sources: National Agricultural Statistics Service and Economic Research Service, USDA.

Oregon's 1993 Bartlett pear crop is expected to be 68,000 tons, down 8 percent from 1992 and 3 percent less than the 1991 crop. Although Oregon's Hood River area has a good crop, rainy spring weather caused poor pollination in Medford and the Willamette Valley. Bartlett pears usually make up about one-third of Oregon pear production. Oregon's total pear output is forecast down less than 1 percent, and other pear production is forecast to increase 4 percent from 1992.

Forecasts of 1993 fall and winter pear production in other States total 34,300 tons, down 8 percent from the prior season. This is only about 10 percent of Pacific Coast production of other-than-Bartlett pears. New York, Pennsylvania, and Michigan are expected to have decreased pear production in 1993, while Colorado, Connecticut, and Utah crop forecasts declined or stayed the same as in 1992.

Pear Prices Pressured

A good crop of fall and winter pears from Washington, as well as abundant apples, will put downward pressure on fresh-market pear prices in 1993/94, despite some growth in exports. Grower prices for fresh-market pears were higher in the last two seasons than in 1990/91 due to smaller crops. The 1992/93 season-average price of \$378 a ton was down just 2 percent from the record high of \$385 in 1991/92.

Grower prices for Bartlett pears used for processing in Oregon, Washington, and California averaged \$234 a ton in 1992, the same as in the year earlier, despite an increase in processed utilization. However, lower grower prices for processing pears are expected in 1993. The Washington-Oregon Canning Pear Association reported the 1993 price for No. 1 Bartletts at \$220 a ton, down from \$230 a ton in 1992. The California canning-pear price is also expected to be down from \$227 a ton in 1992.

Pear Imports Rise and Exports Fall

U.S. imports of fresh-market pears from Chile increased 19 percent in 1992/93. From July 1992 through May 1993, the United States imported 66,312 short tons, of which 75 percent were from Chile. U.S. fresh pear imports from all countries were up 16 percent from the same period in 1991/92.

U.S. exports of fresh-market pears totaled 107,111 tons for the July 1992 through May 1993 period, down 14 percent from the same period a year earlier. During the same months in 1992/93, canned-pear exports were down 32 percent to 4,300 tons. Exports of U.S. fresh and canned pears to the EC were off sharply in 1992/93 compared to 1991/92, when European pear production was curtailed by bad weather. U.S. exports of fresh pears to Canada dipped 3 percent in 1992/93, but exports to Mexico rose 6 percent. Canada and Mexico each accounted for about one-third of U.S. fresh pear exports in 1992/93.

Figure 10

U.S. Grower Prices for Fresh Pears

\$/ton

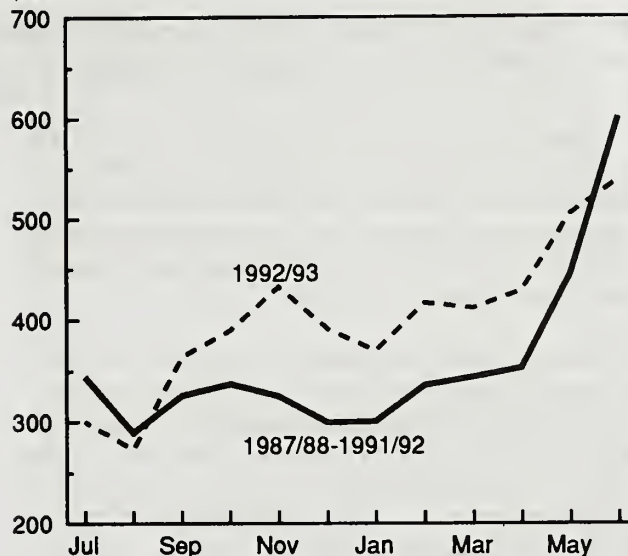
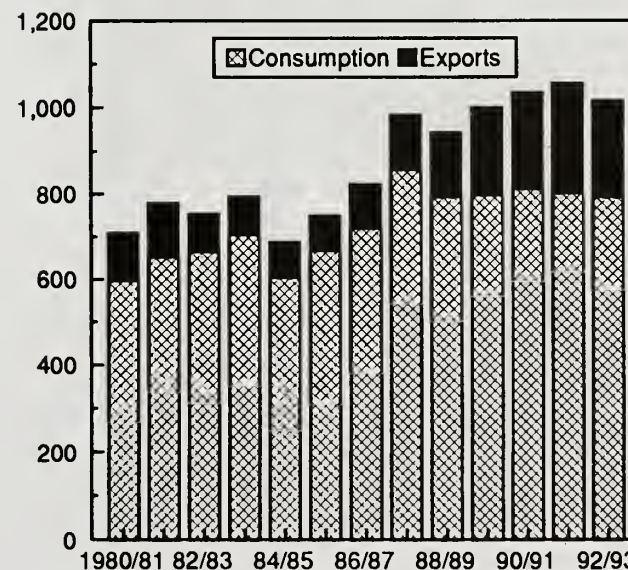
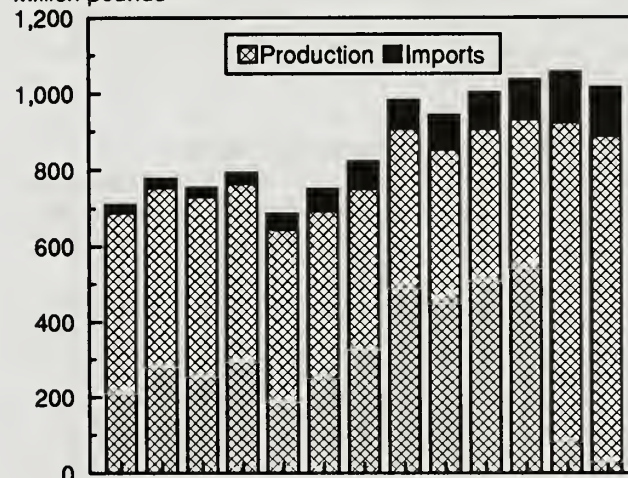


Figure 11

U.S. Fresh-Market Pear Supply and Use

Million pounds



Smaller 1993 Olive Crop Forecast

The 1993 California olive crop is forecast down 30 percent from the record-large 1992 crop. A smaller crop will likely reduce the packed-olive inventory and raise olive prices.

California olive production is expected to total 115,000 short tons in 1993, down from 165,000 tons in 1992. The 1993 forecast is larger than would be expected following such a large crop, but production potential was boosted by nearly ideal weather and more young trees reaching bearing age in 1993.

The average grower price for olives was \$555 per ton in 1992, down just \$4 from 1991. Low packed-olive inventories following the limited pack from the 1991 crop, as well as the high crop quality, supported the 1992 price. Beginning inventory for the 1993/94 season is higher than the prior year, but not excessive. A smaller crop and lower 1993 pack is likely to draw down inventory and raise olive prices.

Olive Pack and Sales Recovered in 1992/93

Data from the California Olive Committee for the first 11 months of the 1992/93 season indicated that pack, sales, and inventory were all well ahead of a year earlier. As of

June 30, 1993, olive sales were up nearly 12 percent from the same time in the 1991/92 season. Despite a very low beginning inventory, the large 1992 crop and increased pack boosted 1992/93 sales.

Sales of sliced olives gained about 14 percent in 1992/93, while sales of medium and large pitted ripe olives were up 30 percent from a year earlier. The packed-olive inventory on July 1, 1993, was estimated at 8.5 million cases (24-can/300-size case basis), 18 percent higher than in 1992 but 2 percent lower than 1991. The inventory will be reduced by a smaller crop this fall.

The larger 1992 crop also led to a 10-percent drop in canned olive imports. For the 11-month period ending June 30, 1993, total U.S. olive imports were 3.19 million cases (24-can/300-size case basis), down from 3.56 million in 1991/92. Spain continues to supply the most canned-olive imports to the United States, with almost 90 percent of the total.

Figure 12

U.S. Olive Production and Price

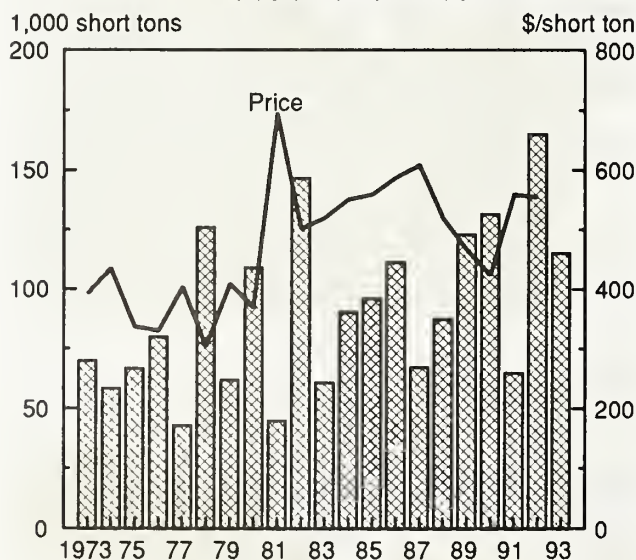


Table 5--California olives: Production and utilization, 1983/84-1992/93

Crop year	Utilized production		Processed utilization		
	Fresh	Processed	Canned 1/	Crushed	Other 2/
-- 1,000 short tons --					
1983/84	0.4	60.6	51.6	4.1	4.9
1984/85	0.4	90.2	82.4	2.9	4.9
1985/86	0.5	95.5	84.5	5.8	5.2
1986/87	0.5	111.0	96.9	6.0	8.1
1987/88	0.5	67.0	60.5	3.0	3.5
1988/89	0.5	87.0	78.5	3.0	5.5
1989/90	0.5	122.5	108.0	5.5	9.0
1990/91	0.5	131.0	110.0	5.0	16.0
1991/92	0.5	64.5	61.0	1.8	1.7
1992/93	3/	165.0	154.0	6.0	5.0

1/ Includes canning and limited size. 2/ Includes undersize and culls.

3/ Not published to avoid disclosure of individual operations.

Sources: National Agricultural Statistics Service, USDA and the California Olive Committee.

Higher Fresh-Market Prices for Most Stone Fruits

Lower production and later maturity led to decreased shipment volumes and higher f.o.b. prices for California peaches, plums, and sweet cherries. Increased peach production in other States is expected to lower prices.

Early Summer Fruit Shipments Down and Prices Up

Plum and sweet cherry crops were smaller in 1993 than the year before and harvest started later than normal. Georgia suffered losses of early-variety peaches due to frost damage in mid-March, but later varieties were expected to do well, and total U.S. peach production is forecast up 4 percent from 1992. Higher season-average prices for plums and cherries are anticipated in 1993, but peach prices are expected to be lower.

Combined peach, nectarine, and plum shipments, through July 19, 1993, were down about 25 percent from the same period a year earlier. Plum shipments were off more than 40 percent, nectarines 24 percent less, and Freestone peach varieties were down 22 percent from the same week in 1992. Tighter supplies brought much higher prices for the earliest summer-fruit shipments.

While peach shipments from other States picked up as the season progressed, total season shipments from California are expected to remain below 1992 levels. In June 1993, the California Tree Fruit Agreement projected shipments of fresh-market Freestone peaches to be off 3 percent from 1992 shipments, with nectarines down 9 percent, and plums 14 percent less.

U.S. Peach Crop Gains in 1993

The total U.S. peach crop is forecast at 1.38 million short tons in 1993, up 4 percent from 1992. Excluding California's Clingstone crop, which is mostly canned, from U.S. peach production brings the forecast to 815,000 tons, up 10 percent from 1992. Projected 1993 output of California Clingstone peaches is 570,000 tons, down 4 percent from the prior year. California Freestone production in 1993 is likely to be down 2 percent to 315,000 tons.

Rains in late May delayed the Freestone harvest in Northern and Central California. Some split pits and brown rot were reported in early varieties. At the end of May 1993, f.o.b. prices for California peaches were nearly 50 percent higher than a year earlier, but they dropped closer to year-earlier levels by mid-June.

Southern Peaches Are Plentiful

South Carolina is expected to be the second leading peach-producing State again in 1993. USDA expects the South Carolina peach crop to total 125,000 tons, 47 percent more than the 1992 freeze-reduced output, but 19

percent less than in 1991. By August 7, 1993, South Carolina peach shipments were up 30 percent from the same time a year earlier. Despite some freeze damage in March, hail in April, and hot, dry weather in June and July, growers reported good quality and more fruit than last year.

The Georgia peach production forecast is 72,500 tons for 1993, up 12 percent from 1992. Cold temperatures and snow in mid-March damaged peaches in southern Georgia, but only the earliest varieties were hurt in the major growing areas of northern Georgia. Harvest began much later than normal in Georgia, with only 9 percent of the peach crop harvested by June 1, compared with a 5-year average of 21 percent. Georgia peach shipments reached normal volume by the end of June and as of August 7, 1993, cumulative shipments were about 10 percent ahead of the same week in 1992.

Most of the other peach-producing States escaped winter-kill and spring freezes. Peaches matured later than normal in much of the northern part of the country because of cool weather. The 1993 New Jersey crop is projected up 12 percent to 47,500 tons, while Pennsylvania's will be 45,000 tons, unchanged from 1992.

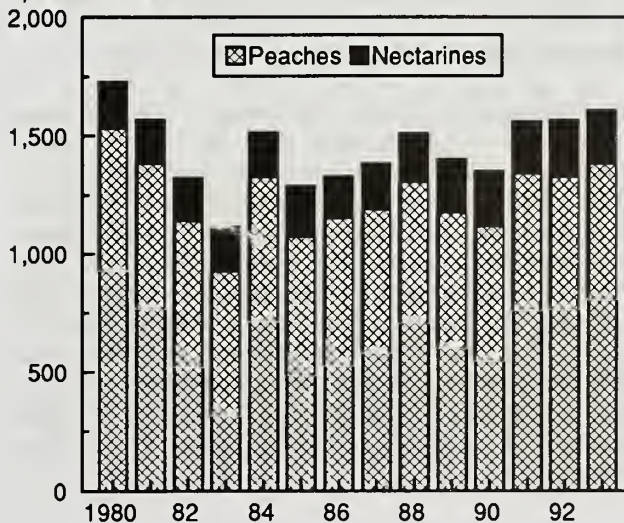
Lower Peach and Higher Nectarine Prices

Grower prices for peaches are likely to decline again in 1993, a second season of lower prices. In 1992, fresh-market peach prices averaged \$416 a ton, down \$6 from

Figure 13

U.S. Peach and Nectarine Production

1,000 short tons



the 1991 season average, and processing-peach prices were \$208 a ton, \$2 lower. The California Canning Peach Association reported a price negotiated with canners for 1993 based on a sliding scale of \$197-230 a ton, compared to \$220-233 a ton in 1992.

The 1993 California nectarine crop forecast is 220,000 tons, 7 percent below 1992. Harvest was delayed by above-average rainfall in May 1993, and lighter shipments brought early-June f.o.b. prices up about 40 percent from a year earlier. By the end of June, f.o.b. prices were down to \$5.80 per carton (size 80), just 10 cents above the same week of 1992. With about half of the California nectarines picked in late July, prices rose to more than \$8 a carton, twice as high as a year earlier.

Peach and Nectarine Trade Mixed in 1992/93

U.S. exports of fresh-market peaches and nectarines gained about 1-percent in 1992/93 (May-April) over 1991/92 exports. Peach exports to Canada increased to about 75 percent of the total, while exports to Mexico declined 30 percent to less than 15 percent of total U.S. peach exports. However, U.S. exports to Mexico may improve this season with the signing of a protocol between the two countries in late June 1993 regarding the fumigation of peaches and nectarines before entering Mexico. Eight California fumigators joined together to fund the inspection and certification process that was reviewed by Mexican officials in mid-July.

U.S. imports of fresh peaches and nectarines dropped 23 percent from 1991/92, to 46,249 short tons 1992/93. According to the Chilean Fruit Export Association, 1992/93 exports of peaches and nectarines from Chile to the United States were off 22 percent, and those to Europe dropped 53 percent from 1991/92. At the same time Chilean exports to Latin American countries more than doubled, so total Chilean peach and nectarine exports to the world were down less than 15 percent in 1992/93.

U.S. canned peach exports were 21,821 tons in 1992/93, down 1 percent from the same period a year earlier. However, U.S. imports of canned peaches increased 14 percent to 24,164 tons, with Greece supplying 87 percent.

Slow Start and Small Crop Raise Plum Prices

The 1993 California plum crop forecast of 220,000 short tons is down 12 percent from 1992, but 1 percent more than in 1991. California supplied more than 90 percent of all U.S. fresh plums in 1992. The smaller crop is expected to boost the season-average grower price for plums from an 8-year low in 1992. Grower prices may also benefit from marketing efforts of the new California Plum Marketing Agreement, which was established late last season. Plums will be promoted domestically, along with California peaches and nectarines, by the California Tree Fruit Agreement. Plum promotion programs are also planned in eight countries, including Taiwan, Mexico, and Venezuela.

The California plum harvest was slow in starting. With just 5 percent of the crop picked in early June 1993, f.o.b. prices were \$18-26 per carton compared to \$7-14 in 1992. Harvest picked up during June as hot weather caused fruit to mature more rapidly. By July 1, with about one-fourth of the crop harvested, f.o.b. prices were down to \$8-12 per carton, still twice as high as year-earlier prices. As of August 7, 1993, cumulative California plum shipments were 38 percent less than at the same time last season. However, growers expect shipment volumes of late varieties to be closer to the 1992 volume and prices to moderate.

California dried prune production in 1993 is projected to be down 27 percent from 1992 and 28 percent less than 1991 output. Scattered rain and humid weather after the 1993 bloom encouraged disease and much of the production reduction can be attributed to brown rot. Harvest began in mid-August.

Prune and plum production in four other States (Oregon, Washington, Michigan, and Idaho) is expected to total 29,500 tons in 1993, down 23 percent from 1992. In Oregon, which usually has the second highest plum and prune output, the 1993 forecast is 12,000 tons, 75 percent of 1992 production. Poor pollination and bacterial spot hampered production in Oregon and Michigan. The season started 2 weeks later than normal in Washington.

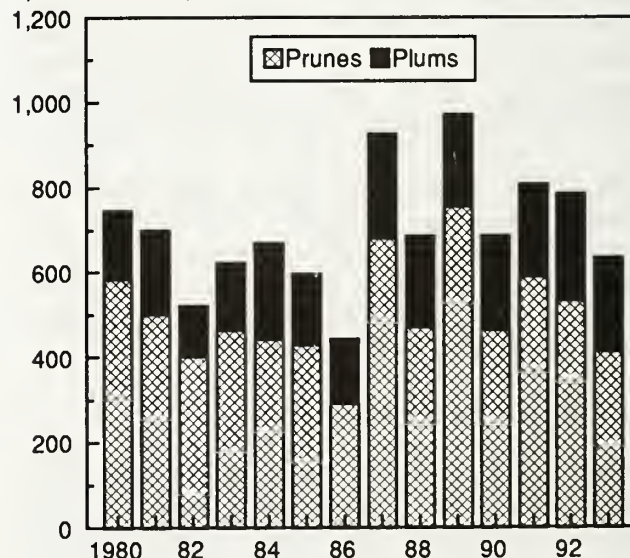
Smaller Sweet Cherry Crops in the West

The 1993 USDA forecast for U.S. sweet cherry production is down 21 percent from 1992, but 10 percent greater than in 1991. Smaller crops are expected in Washington, Oregon, and California. Michigan's sweet cherry production is expected to be higher in 1993 than 1992. Tighter supplies and good-quality crops have resulted in higher cherry prices.

Figure 14

California Prune and Plum Production

1,000 short tons, fresh basis



Although the cool spring produced larger-sized fruit and most of the crop was picked before the early-June rains, California sweet cherry production was down 35 percent to 20,000 short tons in 1993, the smallest crop in 3 years. Oregon's sweet cherry crop forecast is down about 30 percent from a year earlier to 38,000 tons in 1993.

USDA's forecast of the 1993 Washington sweet cherry crop is 75,000 tons, down 23 percent from the record-large 1992 crop of 97,000 tons, but 50 percent more than in 1991. Washington has been the leading sweet-cherry-producing State for the last 10 years, but the 1992 crop was exceptionally large and accounted for nearly half of total U.S. production. The 1993 crop matured much later than normal, with the first harvest in mid-June. Fruit size and quality were good, with only slight rain damage reported.

The small California crop and late-starting Washington harvest pushed up prices. In early June 1993, f.o.b. prices for California sweet cherries were 50 percent higher than the year earlier. A month later, prices for Washington cherries were at \$16 per 20-lb. carton, 33 percent higher than the prior year.

Total U.S. cherry exports rose 78 percent from 1991/92, to 34,169 tons in 1992/93 (May-April). U.S. cherry exports to Japan nearly doubled in 1992/93 and Japan accounted for nearly 40 percent of all U.S. cherry exports. Until 1992 Japan imposed seasonal restrictions on the entry of U.S. cherries to protect domestic producers. U.S. cherries are popular in Japan because they are larger, sweeter, and less expensive than local varieties.

Fewer Tart Cherries Outside Michigan

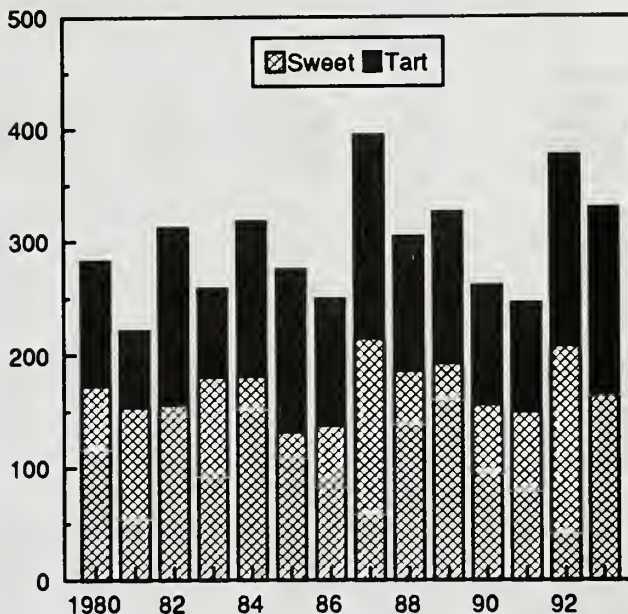
U.S. production of tart cherries is projected down 2 percent, to 164,400 tons in 1993, despite the forecast for a larger crop of 137,500 tons in Michigan, the leading producer. Production is projected down in New York, Oregon, and Utah, but higher in Pennsylvania and Wisconsin. Michigan processors have reported some poor quality that could lower utilization.

Colorado growers are expecting a full crop of 800 tons, the same as in the prior 2 years. However, poor pollination weather and too much rainfall in April and May limited

Figure 15

U.S. Cherry Production

1,000 short tons



production in Oregon and Utah. Oregon's output is expected to be 1,500 tons, down nearly 70 percent from the large 1992 crop and about 40 percent of 1991 and 1990 output. Utah's 1993 tart-cherry-crop forecast of 7,000 tons is less than half the size of its 1991 and 1992 crops.

Apricots Damaged by Rain

California's 1993 apricot production reached 90,000 tons, down 11 percent from 1992. Cool weather during the spring allowed the fruit to size well before ripening, but rain in May and June caused some quality problems due to brown rot. F.o.b. prices for California apricots were \$16-18 the last 2 weeks of June, up from \$14 in the same period of 1992.

While Washington's 1993 apricot crop developed later than last season, production is expected to be up 5 percent to 6,700 tons. Utah's apricot output is expected to fall to 250 tons, mainly the result of a light fruit set that followed cool, wet weather during pollination and hail damage in June.

Table 6--Peaches: Total production and season-average price received by growers, 1990-92 and indicated 1993 production

State	Production				Price per short ton		
	1990	1991	1992	1993	1990	1991	1992
	--1,000 short tons--				-- Dollars --		
Alabama	6.0	8.0	6.5	8.5	476	426	626
Arkansas	9.0	6.0	6.0	11.0	492	500	442
California:	806.0	828.5	912.5	885.0			
Clingstone	506.0	515.0	591.5	570.0	214	218	216
Freestone	300.0	313.5	321.0	315.0	340	264	230
Colorado	8.5	1.0	9.0	9.0	712	760	666
Connecticut	1.8	1.7	2.0	1.8	940	1020	1000
Delaware	0.1	1.5	1.8	1.7	830	570	394
Georgia	65.0	75.0	65.0	72.5	598	482	452
Idaho	2.4	1/	2.7	2.0	434	1/	1/
Illinois	0.2	9.8	9.0	9.0	686	660	552
Indiana	0.4	2.3	3.0	4.0	682	792	886
Kansas	0.1	1.3	0.3	0.5	460	740	846
Kentucky	1/	2.0	2.0	4.0	1/	700	580
Louisiana	2.0	2.5	2.0	1.8	680	720	900
Maryland	2.0	7.5	5.5	6.0	654	484	570
Massachusetts	1.0	0.6	0.6	0.9	940	1020	1100
Michigan	22.5	20.0	25.0	25.0	420	348	338
Missouri	0.4	5.5	4.5	5.5	600	460	540
New Jersey	22.5	57.5	42.5	47.5	818	506	638
New York	7.0	7.5	7.0	5.0	552	548	524
North Carolina	5.0	17.5	6.0	19.0	540	352	392
Ohio	2.8	2.9	7.0	6.0	760	800	760
Oklahoma	4.0	15.5	2.5	10.0	726	610	912
Oregon	7.3	6.5	7.5	7.0	598	712	644
Pennsylvania	38.0	50.0	45.0	45.0	578	402	446
South Carolina	55.0	155.0	85.0	125.0	486	354	416
Tennessee	0.7	3.3	2.1	5.5	740	600	708
Texas	12.0	16.0	13.5	12.5	700	680	740
Utah	6.0	1.3	5.4	5.5	480	680	440
Virginia	1.3	13.0	12.5	14.0	630	382	336
Washington	26.5	15.0	26.0	25.0	510	424	412
West Virginia	1.5	9.0	10.0	9.5	536	286	310
United States	1,116.6	1,343.0	1,329.3	1,384.6	348	314	300

1/ No significant commercial production due to frost.

Sources: National Agricultural Statistics Service and Economic Research Service, USDA.

Table 7--Apricots and nectarines: Total production and season-average price received by growers, 1989-92 and indicated 1993 production

Item and State	Production 1/					Price per short ton			
	1989	1990	1991	1992	1993	1989	1990	1991	1992
	-- 1,000 short tons --					-- Dollars --			
Apricots--									
California	118.0	115.0	90.0	101.0	90.0	323	323	374	340
Utah	0.4	0.3	0.1	0.6	0.3	470	460	820	620
Washington	1.6	7.2	5.7	6.4	6.7	1,400	596	895	791
United States	120.0	122.5	95.8	108.0	97.0	338	340	407	368
Nectarines--									
California	220	232	215	236	220	398	474	402	313

1/ Apricots-includes unharvested production and harvested not sold (short tons), United States: 1989, 1,050; 1990, 2,010; 1991, 4,040; and 1992, 100.

Source: National Agricultural Statistics Service, USDA.

Table 8--Cherries, sweet: Total production and season-average price received by growers, 1990-92 and indicated 1993 production

States	Production 1/				Price per short ton		
	1990	1991	1992	1993	1990	1991	1992
	-- 1,000 short tons --				-- Dollars --		
California	22.0	36.0	31.0	20.0	891	957	1,230
Idaho	2.0	0.4	1.2	1.5	1,080	508	975
Michigan	16.0	21.0	18.0	26.0	512	671	689
Montana	0.3	2/	0.8	0.9	1,670	2/	988
New York	1.0	1.3	1.1	0.6	743	901	976
Oregon	48.0	40.0	55.0	38.0	644	862	867
Pennsylvania	0.1	1.1	1.1	1.2	1,620	1,530	1,740
Utah	1.4	0.8	3.2	1.7	645	875	647
Washington	66.0	50.0	97.0	75.0	1,180	1,200	871
United States	156.7	150.6	208.4	164.9	894	964	912

1/ Includes unharvested production and harvested not sold (1,000 short tons): 1990, 24.4; 1991, 8.2; and 1992, 13.4. 2/ No commercial production due to frost.

Source: National Agricultural Statistics Service, USDA.

Table 9--Cherries, tart: Total production and season-average price received by growers, 1990-92 and indicated 1993 production

States	Production 1/				Price per short ton		
	1990	1991	1992	1993	1990	1991	1992
	-- 1,000 short tons --				-- Dollars --		
Colorado	0.5	0.8	0.8	0.8	414	828	730
Michigan	80.0	55.0	122.5	137.5	370	962	350
New York	8.3	12.8	15.5	7.4	416	900	364
Oregon	3.8	3.8	4.8	1.5	258	590	502
Pennsylvania	1.8	5.8	3.0	5.5	564	964	548
Utah	7.8	13.0	16.5	7.0	282	892	280
Wisconsin	2.4	3.9	4.6	4.7	186	978	300
United States	104.4	95.0	167.6	164.4	362	928	352

1/ Includes unharvested production and harvested not sold (1,000 short tons): 1990, 3.0; 1991, 0.1; and 1992, 11.1.

Sources: National Agricultural Statistics Service and Economic Research Service, USDA.

Table 10--Plums and prunes: Production and season-average price received by growers in principal States, 1990-92 and indicated 1993

State and area	Total production				Price per short ton		
	1990	1991	1992	1993	1990	1991	1992
	-- 1,000 short tons --				-- Dollars --		
California:							
Plums	223.0	218.0	250.0	220.0	603	449	252
Prunes (fresh basis)	463.1	589.0	534.0	413.5	266	298	341
Total California	686.1	807.0	784.0	633.5			
Prunes (dried basis)	147.0	187.0	184.0	135.0	873	940	990
Prunes and plums 1/:							
Idaho	6.8	3.0	4.6	5.5	275	383	265
Michigan	6.0	8.0	8.0	3.0	296	306	268
Oregon	21.0	4.0	16.0	12.0	155	228	154
Washington	14.0	9.1	9.5	9.0	166	253	181
Total 4 States	47.8	24.1	38.1	29.5	195	283	197
United States	733.9	831.1	822.1	663.0			

1/ Includes unharvested production and harvested not sold (1,000 short tons): 1990, 4.6; 1991, .3; and 1992, .2.

Sources: National Agricultural Statistics Service and Economic Research Service, USDA.

Higher Imports Lower Banana Prices

Increased imports raised the U.S. banana supply in 1992 and lowered retail prices. Banana consumption is likely to remain high in 1993, with more Latin American bananas diverted from European markets.

U.S. banana consumption was record-high in 1992, due to increased imports and lower retail prices. While imports early in 1993 were below the year-earlier pace, a smaller U.S. summer fruit crop, with mostly higher prices, is likely to provide less competition. This will allow banana imports to pick up. A seasonal price decline in the spring of 1993 brought wholesale banana prices down below the 5-year average. Even if world banana production declines, imports diverted from Europe would keep U.S. banana prices stable in 1993.

Bananas Still Most Popular Fresh Fruit

Banana supplies in the United States were at a 20-year high in 1992 due to increased imports. Almost all bananas are imported from Central and South America, with Hawaiian production averaging 12 million pounds, less than 1 percent of supplies. Per capita banana consumption rose from 25.1 pounds in 1991 to 27.3 pounds in 1992, well above the previous record-high of 25.8 pounds in 1986. Bananas remained the most popular fresh-market fruit in the United States, followed by apples, 19.3 pounds per capita consumption, and oranges, 12.9 pounds.

In 1992, the United States imported 8.2 billion pounds of bananas and plantains, an increase of 9 percent from the previous year. About half of the imports were from Ecuador and Costa Rica. Ecuador had been the leading source of U.S. banana imports since the mid-1980's, but rains early in 1992 reduced the export-quality crop, so Costa Rica was the major supplier in 1992. From January through April 1993, shipments from Ecuador were down nearly 30 percent from the same period in 1992. However, shipments from Costa Rica and other countries rose, so total U.S. banana imports were off just 6 percent. There may be some tightening of banana supplies compared to last year, but no shortages are anticipated.

Wholesale and Retail Banana Prices Down in 1992

Wholesale banana prices, quoted in New York markets, averaged 34.2 cents a pound in March 1993, down nearly 4 cents from a peak in March 1992, when shipments from Ecuador were sparse. Prices in May 1993 were down to 28.8 cents, lower than a 5-year average but higher than in May 1992. Wholesale banana prices averaged just 29.8 cents a pound in 1992, the lowest annual average since 1987. Banana prices are usually highest between March and May, dropping as U.S. summer fruit becomes available, and remaining seasonally low from August through January.

Retail banana prices follow the same seasonal pattern as wholesale prices, i.e. somewhat lower when more U.S.-produced fresh fruit is available. From January through June 1993, retail prices averaged 46.3 cents a pound, down from 47.2 cents during the same period in 1992, and from 52.7 cents in 1991. Banana prices are likely to remain low in 1993.

Change in EC Policy Could Bring More Bananas to the United States

The European Community (EC) introduced a harmonized import regime for bananas which took effect July 1, 1993, that imposed a higher duty on bananas from Latin America. Prior to the new policy, bananas from Latin America were imported duty free to Germany, which has been the largest single banana-consuming country. The EC imported 2.7 million tons of bananas from Latin America in 1992.

In May 1993, Germany sought an injunction against the new EC policy from the European Court of Justice, but the effort failed. The higher duty will likely reduce Latin American exports to Europe. The industry estimated as much as 25 percent of the bananas formerly going to Europe would be diverted to the rest of the world, mainly the United States and Canada. Banana supplies from Latin America are unlikely to decrease substantially in 1993, and with EC import regulations in effect, North American banana prices are unlikely to rebound.

Figure 16

New York Wholesale Banana Prices

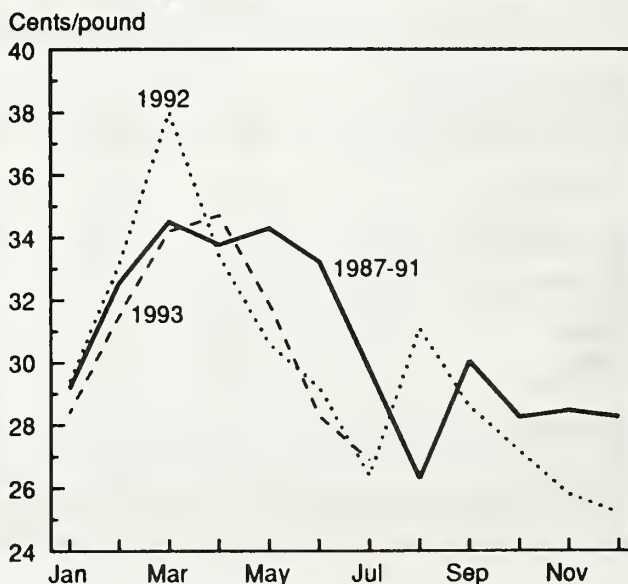


Table 11--U.S. banana imports, including plantains, by country, 1985-92

Year	Colombia	Costa Rica	Ecuador	Honduras	Other	World
-- 1,000 short tons --						
1985	524.9	598.3	833.1	645.8	799.7	3,401.9
1986	622.2	634.5	798.4	598.1	715.1	3,368.2
1987	601.6	616.8	822.8	668.2	677.0	3,386.4
1988	556.3	666.9	873.0	684.1	548.2	3,328.6
1989	537.1	716.5	1,004.9	618.9	539.2	3,416.6
1990	468.0	640.4	1,317.3	544.4	634.4	3,604.5
1991	593.0	766.4	1,287.5	466.6	651.0	3,764.5
1992	546.5	1,067.8	1,057.8	462.0	973.8	4,107.8

Source: Bureau of the Census, Department of Commerce.

Table 12--Bananas: New York wholesale prices 1/

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
-- Dollars per 40-pound carton --													
1987	10.50	11.50	11.65	10.50	10.88	11.45	10.25	10.45	11.31	9.63	10.50	10.38	10.75
1988	10.94	12.05	11.50	12.19	12.65	14.94	12.25	9.30	12.13	11.30	10.88	11.50	13.02
1989	11.05	12.13	14.38	15.50	16.30	12.81	11.56	10.50	11.38	12.05	12.38	11.38	13.26
1990	13.50	15.69	13.38	13.00	13.50	11.81	13.30	12.00	14.40	12.20	11.50	11.94	13.02
1991	12.35	13.69	18.13	16.35	15.25	15.44	12.20	10.38	10.90	11.38	11.69	11.35	13.26
1992	11.75	13.25	15.20	13.38	12.25	11.70	10.56	12.44	11.45	10.88	10.30	10.06	11.93
1993	11.38	12.58	13.70	13.88	12.75	11.30	10.50						
-- Cents per pound --													
1987	26.3	28.8	29.1	26.3	27.2	28.6	25.6	26.1	28.3	24.1	26.3	26.0	26.9
1988	27.3	30.1	28.8	30.5	31.6	37.3	30.6	23.3	30.3	28.3	27.2	28.8	32.5
1989	27.6	30.3	36.0	38.8	40.8	32.0	28.9	26.3	28.5	30.1	31.0	28.5	33.1
1990	33.8	39.2	33.5	32.5	33.8	29.5	33.3	30.0	36.0	30.5	28.8	29.8	32.5
1991	30.9	34.2	45.3	40.9	38.1	38.6	30.5	26.0	27.3	28.5	29.2	28.4	33.1
1992	29.4	33.1	38.0	33.4	30.6	29.2	26.4	31.1	28.6	27.2	25.8	25.2	29.8
1993	28.4	31.5	34.2	34.7	31.9	28.3	26.3						

1/ Average of Tuesday prices during month calculated by ERS for 1992-93.

Sources: Agricultural Marketing Service and Economic Research Service, USDA.

Tropical Fruit Supplies Depend on Imports

A sharp drop in Florida mango output was met with increased imports from Mexico. Papaya consumption rose with more Hawaiian production and imports from Mexico. Fresh pineapple from Central America replaced Mexican imports.

Weather Whips Florida Mangoes

Hurricane Andrew struck Florida's mango-producing region August 24, 1992, after the mango harvest was mostly complete and was not responsible for the 20-percent decline in Florida's mango output. An early bloom was subjected to cold temperatures that reduced the quantity and quality of Florida's 1992 mango crop. However, the hurricane did substantial damage to mango trees, reducing production potential for the next several years. A survey completed in March 1993 showed Florida mango acreage down 37 percent from a similar survey in November 1990. Acreage and production had been relatively stable before Hurricane Andrew.

The remaining Florida mango trees were subject to another severe storm on March 13, 1993, with heavy rain and strong winds that damaged the first fruit set. Most Florida mangoes are usually shipped from May through August. In early June, growers reported very limited fruit and minimal fresh-market shipments were expected for the remainder of the season. However, there have been ample supplies in U.S. markets as imports from Mexico, as well as Central American and Caribbean countries, have picked up.

Mexico Supplies U.S. Mango Market

Mango imports, mainly from Mexico, provided about 85 percent of total U.S. mango supplies in the last 5 years. U.S. imports from Mexico declined 10 percent in 1992 because the early crop was damaged by heavy rains. Lower domestic production and imports brought U.S. consumption estimates for 1992 down to 0.68 pounds per capita from the all-time high of 0.85 pounds in 1991.

Mexico's 1993 mango crop is expected to be larger, and early shipments to the United States were much higher than a year earlier. U.S. imports of Mexican mangoes during the first 5 months of 1993 were up 34 percent from the same period in 1992. The Mexican shipping season usually begins in February and lasts through August, with July the busiest month. So, 1993 season-total exports to the United States will probably be up by more than a third.

Papaya Production and Consumption Rise

Increased Hawaiian production and imports boosted U.S. fresh papaya consumption in 1992 to 0.24 pounds per capita, the highest estimate since 0.26 pounds in 1984. Fresh utilization of domestic (Hawaiian) production was

up 16 percent from 1991, but was 16 percent below 1984. Much higher 1992 imports more than compensated for the difference in domestic utilization between 1984 and 1992. Imports of papaya, mostly from Mexico, were up more than 70 percent in 1992, while exports declined slightly from 1991. The United States is the leading exporter of papayas to Japan, but Japan's economic slowdown dampened imports of most fruit.

Utilized production of Hawaiian papayas was estimated at 71.3 million pounds in 1992, up nearly 30 percent from the prior year and 7 percent above the 5-year production average. Processed utilization was at an all-time high of 15.5 million pounds in 1992 and fresh papaya prices averaged 25 cents a pound, the same as in 1990 and down from 33.3 cents in 1991.

Year-to-date fresh production of Hawaiian papayas as of August 1, 1993, was off 3 percent from the same period in 1992. Because papayas are harvested throughout the year and require about 4 months from bloom to maturity, winter storms are more likely to reduce output in the first half of the year. Papaya production is usually heaviest in September and October, so 1993 output can easily catch up with 1992. USDA does not forecast Hawaiian papaya production.

Pineapple Imports Boost Consumption

In 1992 Hawaii produced 1.1 million pounds of pineapple, down 1 percent from 1991. However, fresh utilization rose 4 percent because a smaller portion of the crop was processed than in 1991. U.S. consumption of fresh pineapple rose in 1992, as 260 million pounds of domestic pineapple was augmented by 273 million pounds of imports. Fresh-pineapple consumption estimates have risen steadily from 1.5 pounds per capita in 1980 to 2.0 pounds in 1992. Fresh pineapple imports increased nearly 90 percent between 1982 and 1992, accounting for most of the consumption gain. Fresh use of domestically produced pineapple, on the other hand, was about the same in 1982 and 1992.

In the early 1980's, Mexico was the major supplier of U.S. fresh pineapple imports. However, since the 1983 Caribbean Basin Initiative established duty-free status, imports from Central America have increased. In 1992, 48 percent of U.S. fresh pineapple imports were from Costa Rica and 26 percent from Honduras, with only about 10 percent of shipments from Mexico.

More than 70 percent of Hawaiian-grown pineapple is usually processed, but the United States imports much larger quantities of pineapple products than it exports. In the past 3 years, imports of canned pineapple and juice were 75-80 percent of total supplies, and exports amounted to just 2-4 percent of imports. U.S. canned pineapple exports in 1992 were mainly to Japan (43 percent) and Canada (33 percent). Thailand provided about half of U.S. imports of canned pineapple and juice, and nearly 40 percent was from the Phillipines. Imports of pineapple products have been growing as Hawaiian production declines.

Figure 17

U.S. Fresh Banana Consumption

Pounds per capita

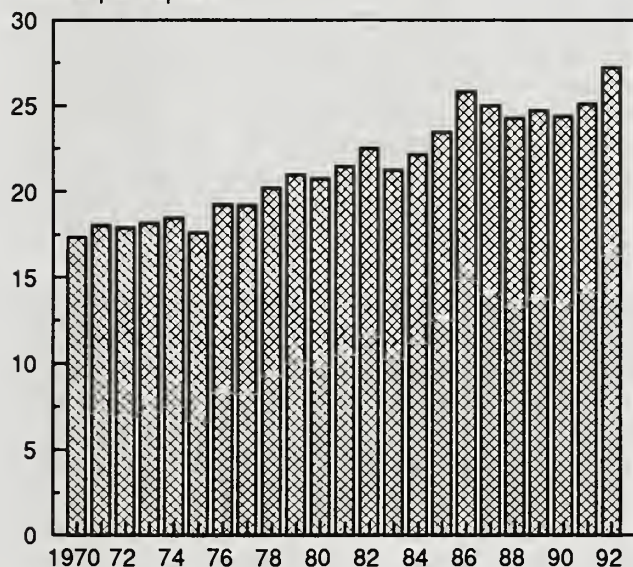
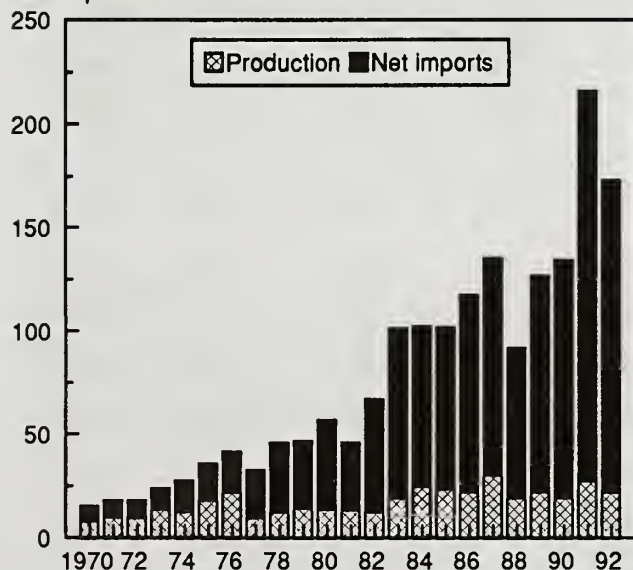


Figure 18

U.S. Mango Consumption

Million pounds



The value of Hawaiian pineapple production in 1992 was \$102.1 million, down 5 percent from 1991. The season-average price for fresh pineapple was up 4 percent from 1991, but the processing price was off 15 percent. Acreage harvested declined again in 1992, the fifth consecutive year of lower acreage and reduced production. Since 1987, pineapple acreage has declined 27 percent and utilized production has dropped 20 percent. Hawaiian pineapple production will probably continue to dwindle in the face of increased pressure from nonagricultural land use and foreign competition.

Figure 19

U.S. Fresh Papaya Consumption

Pounds per capita

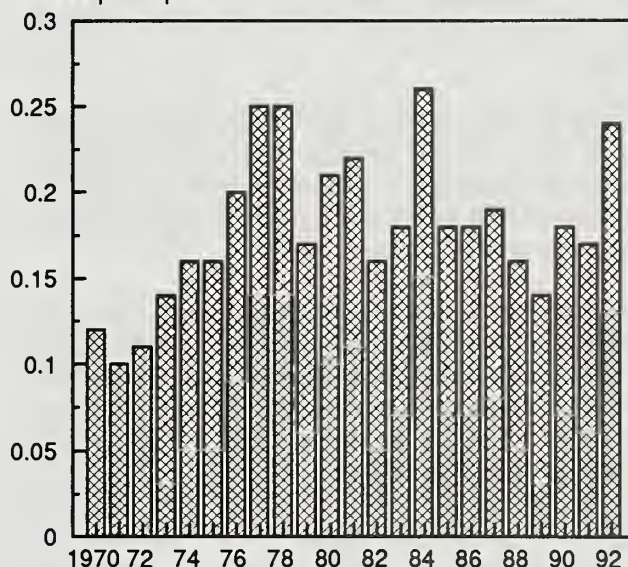
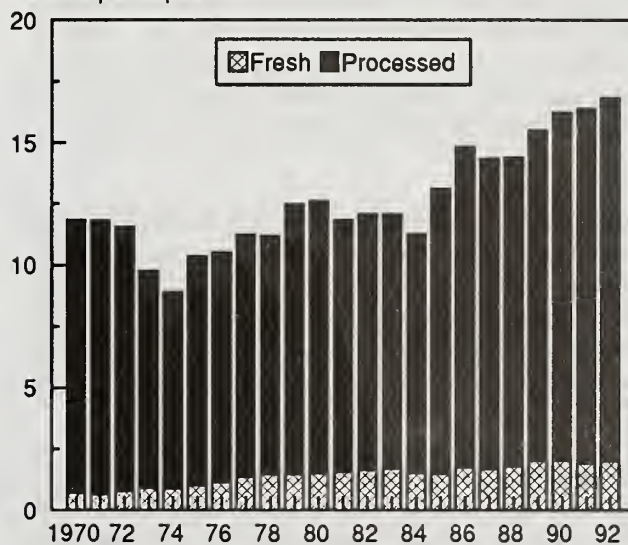


Figure 20

U.S. Pineapple Consumption

Pounds per capita*



*Fresh-weight equivalent.

Growing Kiwifruit Market

California had a record-large kiwi crop in 1992 and domestic consumption and exports rose as grower prices plummeted. A drop in kiwifruit imports from New Zealand was not offset by more from Chile and total 1992 kiwi imports fell.

Record-High Kiwifruit Output From California

California produced 50,400 tons of kiwifruit in 1992, the largest output since 1981 when USDA began reporting California kiwifruit data. The 70-percent production gain was not the result of increased acreage, but of higher yields resulting from more vineyards attaining mature yields and intensified cultural practices. The bumper crop brought grower prices down to 35 percent of the 1991 average.

The volume of kiwifruit shipped from California during March 1993, typically the peak month, was double the March 1992 volume. F.o.b. prices of California kiwifruit averaged \$4.00-4.50 per carton (size 36) in March 1993, down from \$6.50-7.00 a year earlier.

Kiwifruit consumption estimates have risen nearly every year, from 0.03 pounds per capita in 1981 to 0.48 pounds in 1990 and in 1992. Domestic production and imports both increased markedly in the 1980's. Imports provided more than half of U.S. supplies in 1990 and 1991, but fell to about one-third in 1992.

Exports Up and Imports Steady

Exports of U.S. kiwifruit have been declining since 1988. Production and exports from New Zealand and Chile were increasing in the late 1980's, and more recently from Italy and France. However, the large 1992 California crop and lower prices boosted kiwifruit exports. From October 1992 through May 1993 U.S. kiwi exports were up almost 10 percent from the same period the prior year. Exports to Canada and Japan were off, but shipments to Taiwan were more than double year-earlier levels. Canada was the major destination of U.S. kiwifruit exports in 1991/92.

During the first 6 months of 1993, U.S. kiwifruit imports were down 2 percent from the year earlier. The California kiwifruit marketing season begins in November and extends through April. June to November is California's off-season, when most shipments are imports from Southern Hemisphere countries, mainly Chile and New Zealand.

U.S. imports of New Zealand kiwifruit dropped in 1992 following imposition of a dumping-deposit penalty. The United States imported eight times more from New Zealand than from Chile in 1991. However, in 1992, imports from Chile rose to nearly 1.5 times imports from

New Zealand. A drop in kiwifruit imports from New Zealand was not offset by more from Chile and total 1992 U.S. imports of kiwifruit fell 30 percent in 1992.

Dumping Deposit Penalty in Effect

Restrictions imposed by the International Trade Administration (ITA) of the U.S. Department of Commerce discourage exports of New Zealand kiwifruit to the United States. In 1992, the ITA ruled that New Zealand had been "dumping," i.e. selling below the cost of producing and transporting, kiwifruit in the United States in 1990/91 and that the dumping was injurious to U.S. producers. The penalty imposed by the ITA required New Zealand exporters to make a cash deposit equal to 98.6 percent of their kiwifruit invoice value.

The ITA will review New Zealand's 1992 sales and marketing practices and, if the price of all kiwifruit sold in the United States was comparable to the price in Japan (at or above "fair market value"), the deposit will be refunded. The deposit requirement is reviewed annually so the amount of the deposit may vary from year to year. Also, the New Zealand Kiwifruit Marketing Board plans to seek revisions in the dumping decision. Revisions sought include changing the comparable foreign market from Japan to another country and lowering the amount of the New Zealand production costs used in the original ITA investigation.

Table 13--Kiwifruit: Acreage, production, season-average grower prices, and value, California, 1985-92

Year	Bearing acreage 1,000 acres	Total production 1,000 short tons	Prices Dollars/ton	Value 1,000 dollars
1985	4.8	22.0	813	16,667
1986	5.6	24.3	1030	24,102
1987	6.8	29.0	710	18,886
1988	7.1	32.7	760	22,420
1989	7.2	40.0	400	14,800
1990	7.3	39.0	415	14,110
1991	7.3	29.6	820	21,976
1992	7.1	50.4	290	13,340

Source: National Agricultural Statistics Service, USDA.

Blueberry Crop Late but Large

A cool, wet spring delayed the start of the 1993 blueberry harvest. However, U.S. production of cultivated blueberries is expected to be up, as Michigan and New Jersey recover from freeze-reduced outputs in 1992. Large stocks of frozen berries and larger 1993 crops will dampen blueberry prices.

High Volume of Fresh Blueberries Lowers Prices

Growers in the two major cultivated-blueberry-producing States, New Jersey and Michigan, expect good-quality crops in 1993, with average levels of production. Blueberry development was affected by a long, cold spring that delayed the start of New Jersey shipments until after mid-June and Michigan shipments until mid-July. Lower market prices resulted from abundant volume in late-June, with shipments from New Jersey, Washington, and Oregon, as well as southern-producing States (Arkansas, Georgia, North Carolina, Texas, and Mississippi). Prices in late-June and early-July 1993 were \$2-3 lower than the \$14-per-tray price that held until mid-July 1992.

New Jersey recovered from a May 1992 freeze that reduced output to 12,000 short tons. An average New Jersey blueberry crop of about 15,000 tons, with one-third of production processed, is anticipated in 1993. Shipments of New Jersey blueberries will probably continue into the third week of August. F.o.b. prices at the end of June were \$11-12 a flat (12-1/2 pint film-wrapped cups), compared to \$16 the week ending July 3, 1992.

More Blueberries for Processing Projected

Michigan blueberry growers anticipate a normal-to-large 1993 crop, following the small 1992 crop that resulted from a spring freeze. Processors expect Michigan's blueberry output to reach 30,000 tons in 1993. USDA estimated 1992 production at 17,000 tons, with 70 percent processed. Michigan blueberries had a long bloom period, which indicates different ripening stages and a constant, fairly heavy supply of berries. Shipments of Michigan blueberries are expected to last through September and, perhaps, into early October.

The Michigan Blueberry Growers' Association expects prices to be down to \$0.98-1.09 a pint from last year's prices of \$1.29-1.59. USDA reported July 1, 1993, that stocks of frozen blueberries in the United States were 8 percent above a year earlier. Stocks were up even more

in Canada. The North American Blueberry Council projected the highest beginning stocks of frozen blueberries in 10 years. Combined U.S. and Canadian frozen blueberry carry-in, as of July 1, 1993, was estimated up 36 percent from July 1, 1992.

Processors project a decline in Maine's wild blueberry output from 42,100 tons in 1992 to 35,000 tons in 1993. Increased production in Michigan and the Canadian Provinces are expected to more than offset the decline in Maine's blueberry output. Ample supplies of processing blueberries from the 1993 crop, coupled with relatively high stocks of frozen berries, point toward weaker blueberry prices in 1993.

Table 14--North American blueberry production, 1991-93

State or Province	1991	1992	1993 1/
-- 1,000 short tons --			
Cultivated:			
Michigan	25.5	17.0	30.0
New Jersey	20.0	12.0	17.5
British Columbia	6.6	15.0	11.5
North Carolina	5.8	5.3	6.5
Washington	2.8	4.1	3.5
Oregon	6.3	7.8	7.0
Indiana	1.9	1.3	2.3
Georgia	2.6	6.0	2.5
Arkansas and others	3.0	4.1	2.7
Total	74.3	72.5	83.5
Wild:			
Maine	19.7	42.1	35.0
Nova Scotia	14.0	16.6	16.0
Quebec	11.3	4.0	8.5
New Brunswick	4.3	4.6	4.0
Newfoundland	2.0	0.4	0.8
Prince Edward Island	0.8	0.8	0.8
Total	52.0	68.6	65.0

1/ Preliminary.

Sources: Michigan Frozen Food Packers Association and the North American Blueberry Council.

More Strawberries Expected in 1993

U.S. strawberry production is projected to be up in 1993. An increase in the 1993 California strawberry crop will more than offset a decline in Florida's output. A large summer crop will keep prices low through most of 1993.

Ten Percent More California Strawberries

The 1993 U.S. strawberry crop is expected to be 7 percent larger than the 1992 crop. The forecast for California, the major strawberry-producing State, is 563,500 short tons, up almost 10 percent from the prior year. Florida's winter strawberry crop forecast is 62,500 tons, down 11 percent from 1992. Production in other major spring-strawberry-growing States (Michigan, New Jersey, Oregon, and Washington) is projected to total 44,350 tons, a slight increase over the prior year. The five-State forecast for total spring strawberry production is up 9 percent from 1992.

Despite the larger total crop forecast, fresh strawberry shipments, including imports, were 10 percent less from January through May 1993 than during the same period in 1992. This period is the usual marketing period for Florida strawberries, with the most berries usually shipped in March, so it is likely that a smaller Florida crop contributed to the decline. California harvests strawberries year around, but shipments are the heaviest from April through June. California shipments were disrupted by rain early in 1993, but picked up in June and July.

Rain-Delayed Harvest Raises Grower Prices

Monthly grower prices for fresh-market strawberries declined seasonally from January through May 1993 and averaged 73 cents a pound, compared to 70 cents during the same period in 1992. Rain in California damaged some mature fruit and slowed picking in January and February 1993. Retail prices decline seasonally and, from February through May 1993, averaged \$1.13 a pound--about the same as the year earlier. A larger summer crop will keep prices below year-earlier levels through fall.

U.S. Strawberry Exports Rise and Imports Fall

Although California strawberry production was down somewhat in 1992, U.S. strawberry imports declined for the second consecutive year, but U.S. exports increased. U.S. imports of fresh-market strawberries dropped to 11,902 short tons, 24 percent less than 1991, and frozen imports were off 12 percent from the prior year to 21,794 tons.

Mexico, which has been the source of 85-95 percent of U.S. strawberry imports in the last 5 years, had a weather-related production decline that constrained shipments early in 1992, but production picked up in the

Table 15--Strawberries: Production, major States, 1990-92 and indicated 1993 1/

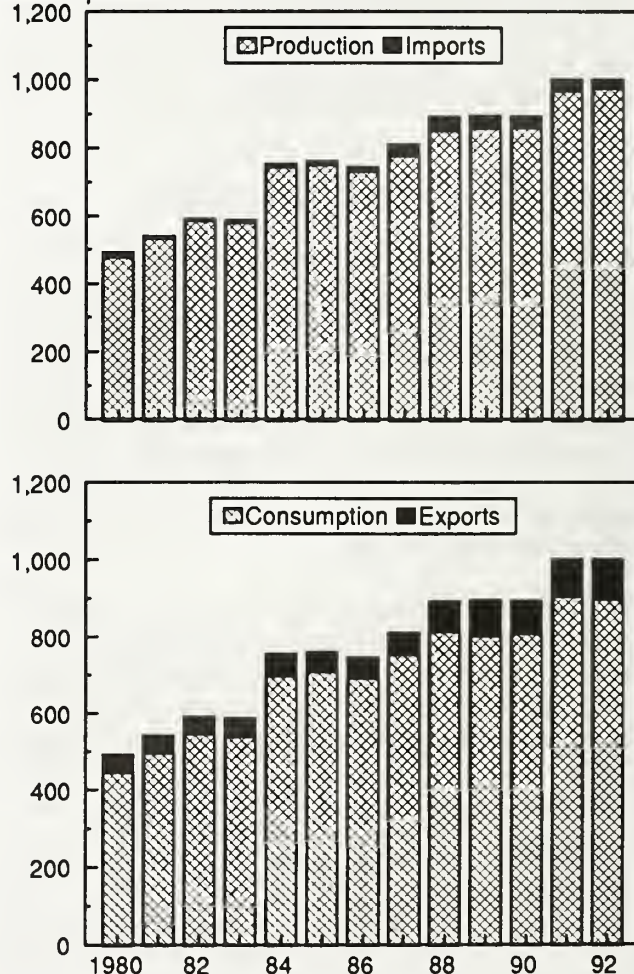
State	1990	1991	1992	1993
-- 1,000 short tons --				
Early:				
Florida	58.3	66.0	70.5	62.5
Late:				
California	493.5	548.6	514.8	563.5
Michigan	7.2	6.5	6.1	6.5
New Jersey	1.1	1.0	1.3	1.3
Oregon	32.8	30.8	30.5	31.0
Washington	6.3	4.2	5.6	5.6
Group total	540.8	591.1	558.3	607.9
Total	599.1	657.1	628.8	670.4

1/ Includes fresh market and processing.

Sources: National Agricultural Statistics Service and Economic Research Service, USDA.

Figure 21

U.S. Fresh-Market Strawberry Supply and Use



fall with a larger 1992/93 crop. During the first 6 months of 1993, shipments from Mexico outpaced the prior year. Total Mexican exports of fresh strawberries were up about 70 percent in 1992/93 (August-July) from the prior season, and the United States is the major export market. In 1992, Mexico provided 92 percent of U.S. imports of frozen strawberries and 86 percent of fresh-market strawberry imports.

The United States exported 51,132 tons of fresh-market strawberries in 1992, up 7 percent from the year earlier. Exports of frozen strawberries rose 15 percent, to 11,902 short tons. Canada remained the major destination for U.S. fresh strawberries accounting for 77 percent of the 1992 total. Japan continued to receive the largest share of U.S. frozen strawberry exports, about 60 percent, compared to Canada's 20 percent.

The United States exports small quantities of fresh strawberries to Mexico during the summer and late fall before the Mexican crop is available. Wholesale prices are generally much higher for U.S.-produced berries than Mexico's crop, but the berries are of higher quality. U.S. exports of fresh and frozen strawberries are currently subject to a 20-percent import tariff in Mexico.

Figure 22

U.S. Grower Prices for Fresh Strawberries

\$/pound

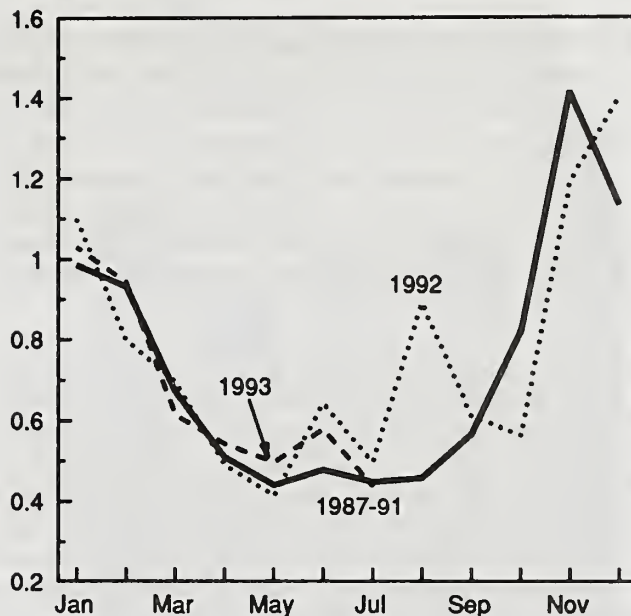


Table 16--U.S. shipments of fresh strawberries, by source, 1988-92

Source/year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
-- 1,000 short tons --													
California													
1988	1	9	38	81	73	50	34	24	15	10	3	0	337
1989	1	4	20	88	89	40	33	28	16	9	3	2	333
1990	5	8	18	75	86	50	42	29	17	12	6	3	350
1991	1	7	17	82	86	67	48	34	29	19	6	2	398
1992	3	8	26	94	88	51	43	25	24	17	3	1	382
Florida													
1988	5	3	12	5	1	0	0	0	0	0	0	2	27
1989	5	4	16	1	0	0	0	0	0	0	0	2	29
1990	2	7	11	2	0	0	0	0	0	0	0	4	26
1991	5	6	12	2	0	0	0	0	0	0	0	3	27
1992	4	8	13	4	0	0	0	0	0	0	0	2	32
Mexico													
1988	1	2	5	4	3	2	0	0	0	0	1	1	18
1989	2	2	3	3	2	1	0	0	0	0	0	1	15
1990	2	1	3	4	2	1	0	0	0	0	1	1	16
1991	2	3	2	3	2	2	0	0	0	0	1	1	16
1992	1	1	3	2	1	0	0	0	0	0	0	1	10
Total													
1988	7	14	54	89	76	52	34	24	15	10	3	4	383
1989	8	10	40	93	91	41	33	28	16	9	4	4	377
1990	8	16	31	82	88	51	42	29	17	13	7	8	392
1991	8	16	31	86	88	68	48	34	29	19	7	6	441
1992	8	18	42	100	89	52	43	25	24	17	3	4	424

Sources: Agricultural Marketing Service and Economic Research Service, USDA.

Fresh-Market Orange Supplies Abundant in 1992/93, Prices Lower

Fresh-market orange quality has been good in 1992/93, but large U.S. citrus supplies pressured grower prices for California navels and Florida fresh-market oranges.

The 1992/93 U.S. orange crop is forecast at 11.1 million short tons, the largest since 1979/80 and 24 percent more than the 1991/92 crop. A large navel orange crop in California led to a plentiful supply of fresh-market oranges, while more Florida oranges boosted the supply of orange juice.

Large supplies of citrus in both States pressured grower prices through most of the 1992/93 season. U.S.-average, on-tree, grower prices for all oranges dropped to less than \$3.00 a box in December 1992, for the first time since 1976/77. In March 1993 orange prices averaged \$2.11 a box, about 30 percent of the year-earlier price. However, by July 1993, higher prices for the only remaining oranges (California Valencias) increased the all-orange price to \$4.10 a box, up from \$2.32 in July 1992.

Bumper 1992/93 Navel Crop in California

California's navel orange output in 1992/93 was 1.64 million tons, the second largest on record and up 25 percent from 1991/92. The Arizona navel crop was 28,000 tons, down 3 percent. Grower prices for fresh-market California and Arizona navels were much lower and averaged \$6.53 per 75-pound box (on-tree equivalent) through June 1993, down from \$10.58 a year earlier. Likewise, retail prices for navel oranges averaged about \$0.52 per pound from January through May 1993, down from \$0.59 during the same period in 1992.

Smaller Valencia orange crops are expected in both California (22 percent less than in 1992) and Arizona (28 percent less than in 1992). A smaller, better-quality crop led to higher grower prices than a year earlier for fresh-market Valencias in California, up about 2 percent in June and up nearly 30 percent in July.

Florida Fresh-Market Orange Prices Also Lower

Florida produced a near-record orange crop of 8.4 million short tons, up 33 percent from a year earlier and the largest in 13 years. Florida growers encountered a very competitive market because of large fresh-market supplies from California. According to the Citrus Administrative Committee in Florida, the season-average f.o.b. price was \$6.49 for fresh-market navels and \$5.30 per 45-pound box for other early- and mid-season fresh-market oranges, down 37 percent and 28 percent, respectively, from a year earlier.

Despite the much larger Florida crop, fresh-market shipments in 1992/93 declined 8 percent from a year earlier. Fresh-market orange utilization in Florida has declined each year since California returned to full production following recovery from the December 1990 freeze.

Exports Up in 1992/93

U.S. fresh orange exports (including Temples) totaled 426,198 short tons from November 1992 through May 1993, up 11 percent from a year earlier. Increased shipments to the major markets of Canada (up 34 percent) and Hong Kong (up 54 percent) more than offset declines to Japan (down 22 percent) because of reduced demand caused, in part, by a slowdown in its economy.

California Orange Prospects

Spring rains interrupted the spring bloom for California's 1993/94 crop, but brought much needed moisture to some growing areas. The first USDA forecast for California navel orange production will be available September 9, 1993.

USDA Indefinitely Suspends Volume Controls on California-Arizona Navel Oranges

On June 18, 1993, Secretary of Agriculture Mike Espy announced that the U.S. Department of Agriculture would seek to amend the federal marketing orders that authorize regulation of shipments of California/Arizona navel and Valencia oranges. Restrictions on weekly shipment volumes have been indefinitely suspended until a satisfactory resolution of industry differences over the implementation of the orders is achieved. The decision to review the orders came in response to the accumulation of a substantial number of lawsuits resulting from alleged shipping violations by industry participants.

USDA has asked the Navel and Valencia Orange Administrative Committees, the agencies responsible for local administration of the marketing orders, as well as other interested parties, to develop proposals for amending their respective marketing orders. In the meantime, the committees will continue to report industry data and information.

Figure 23

U.S. Oranges: Fresh Utilization

Million short tons

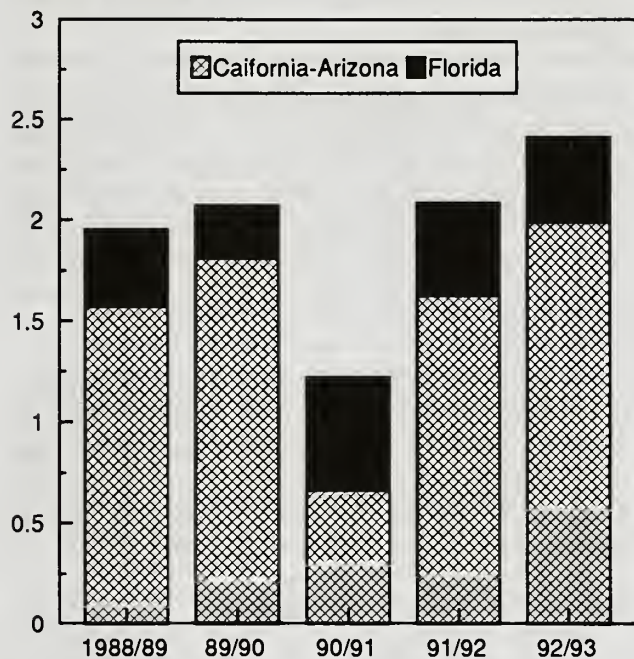


Figure 25

U.S. Oranges: Processed Utilization

Million short tons

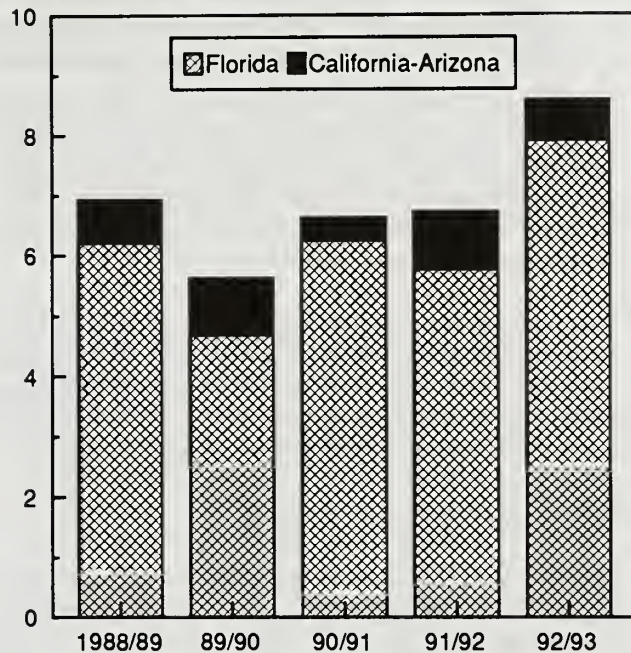


Figure 24

California Oranges: Equivalent On-Tree Returns for Fresh Use

\$/75-lb. box

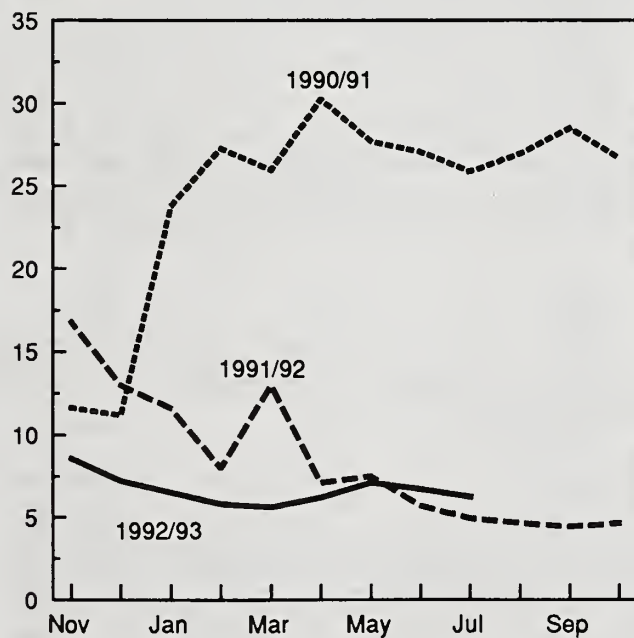
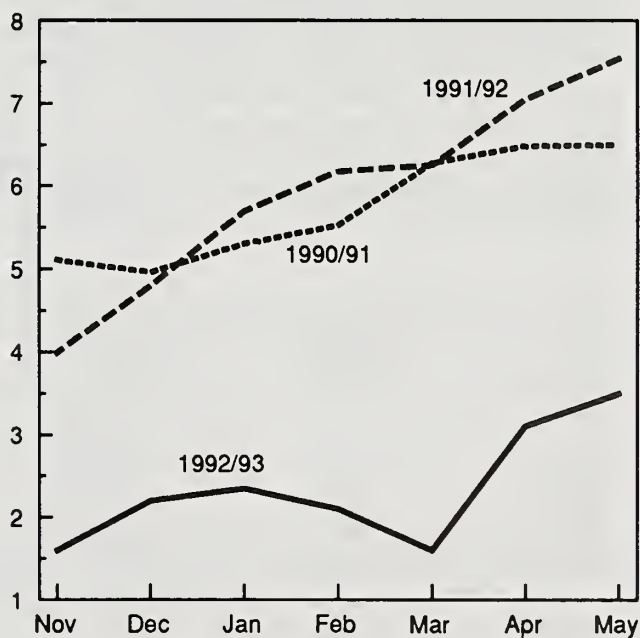


Figure 26

Florida Oranges: Equivalent On-Tree Returns for Processed Use

\$/90-lb. box



Record Orange Juice Production in 1992/93

The 1992/93 orange harvest is complete in Florida. Growers harvested a crop that was one-third larger than the 1991/92 crop, but prices were considerably lower.

USDA's July estimate of early- and mid-season orange production pegs the 1992/93 Florida crop at 5.14 million short tons, up 37 percent from a year earlier. The Valencia crop is expected to total 3.25 million tons, up 22 percent. Ideal weather conditions throughout the season contributed to the large 1992/93 crop.

The large Florida crop and record Florida juice yield of 1.58 gallons (42 degrees Brix) per box combined to push U.S. orange juice production to an estimated 1,216 million gallons (single-strength equivalent) in 1992/93, up 32 percent from a year earlier and the highest on record.

Grower Returns Low in 1992/93

In March 1993, the Florida on-tree price was \$1.60 a box for processing oranges, only 26 percent of the year earlier. Season-average prices for Florida's processed oranges have not been less than \$5 a box in the past six seasons, but from November 1992 through May 1993, monthly-average prices were not above \$3.50 a box.

Lower Prices Spurred Retail Movement

Much higher Florida juice production led to lower prices. Retail prices for frozen concentrated orange juice (FCOJ) averaged \$1.64 per pound during the first 6 months of 1993, down 15 percent from the same period in 1992. These lower prices spurred retail movement. Based on Nielsen Scanner data (sales in supermarkets with annual volume exceeding \$4 million), orange juice volume increased 12 percent during the first 5 1/2 months of 1993 above the same period in 1992.

In response to strengthening demand for FCOJ this past spring, processors raised bulk FCOJ prices from just under \$0.90 per pound solids to \$0.95 in April. Prices were increased again in June and July, reaching \$1.30 for the week ending July 24, 1993. Wholesale prices are not likely to decline significantly during the remainder of 1993, especially if a large Florida crop does not materialize in 1993/94.

As expected, more than ample U.S. orange juice supplies in 1992/93 reduced the need for imports, which are forecast to decline 36 percent from a year earlier. Adequate domestic juice supplies have kept U.S.-produced orange juice competitively priced, forcing more Brazilian product to other markets such as Japan and the EC.

Smaller 1993 Orange Crop in Brazil

Less oranges are expected to be processed in Brazil in 1993 because a smaller Sao Paulo crop followed last year's record. Brazilian orange juice production is expected to total 1,434 million single-strength equivalent (SSE) gallons in 1993/94 (beginning July), down 10 percent from a year earlier. However, 1993/94 supplies of orange juice in Brazil are projected down only 2 percent because of larger beginning stocks.

Smaller 1993/94 FCOJ supplies in Brazil will likely have minimal impact on U.S. grower prices for processed oranges, if the 1993/94 Florida orange crop is near normal or as large as the 1992/93 crop. On the other hand, grower prices for processing oranges would likely increase in 1993/94, if Florida harvests a substantially smaller

Table 17--United States: Orange juice supply and utilization, 1985/86-1992/93

Season 1/	Beginning stocks	Production	Imports	Exports	Domestic consumption	Ending stocks 2/
-- Million SSE gallons 3/ --						
1985/86	249	683	546	71	1,204	204
1986/87	204	781	557	73	1,267	201
1987/88	201	907	416	90	1,223	212
1988/89	212	970	383	98	1,234	232
1989/90	232	652	492	90	1,062	225
1990/91	225	876	327	96	1,174	158
1991/92	158	923	286	108	1,107	152
1992/93 4/	152	1,216	183	119	1,223	208

1/ Season begins in December of the first year shown. 2/ Data may not add due to rounding. 3/ SSE = Single-strength equivalent. 4/ Forecast, August 1993.

Source: Foreign Agricultural Service, USDA.

orange crop and Brazilian juice supplies decline as projected.

FCOJ Futures Price Rebounds

Orange juice futures prices for near-term contracts on the New York Cotton Exchange climbed higher in the late spring and summer following a 16-year low in February. Lower retail prices increased movement, helping put a floor under the FCOJ price. Also, the market may have been affected by concern about the 1993/94 Florida crop and expectations for a smaller Brazilian crop.

Last year, the futures price fell during the final quarter of 1992 and into 1993 as a larger 1992/93 crop was realized. In contrast, the futures price rose nearly 60 cents following the announcement of a smaller-than-expected Florida orange crop in October 1991.

Forecast for 1993/94 Orange Crop Available in October

An uneven bloom in Florida caused by frequent weather changes last spring is expected to result in less uniform fruit size and maturity in 1993/94. Field reports this summer have indicated excessive fruit droppage in some Florida orange groves, which is caused by blossom blight--a fungal disease that attacks the flower as it opens. The blossom and newly forming fruit then fall to the ground before maturity.

The late winter storm that passed through the Eastern United States on March 13 and March 14 caused minor citrus tree damage--only to some new leaves. Although

some bloom loss (1993/94 crop) was reported in central Florida, peak bloom was 2 weeks away at the time of the storm.

Several factors could boost Florida's orange crop potential in 1993/94. Adequate rainfall during the spring and summer will increase fruit size. Also, more orange trees will be coming into full production. The number of bearing orange trees increased from 42.6 million in 1989/90 to 56.7 million in 1992/93. USDA's first production forecast of Florida's 1993/94 crop will be released October 12, 1993.

Figure 27

Orange Juice: Near-Term Futures Contract Prices

\$/pound solids

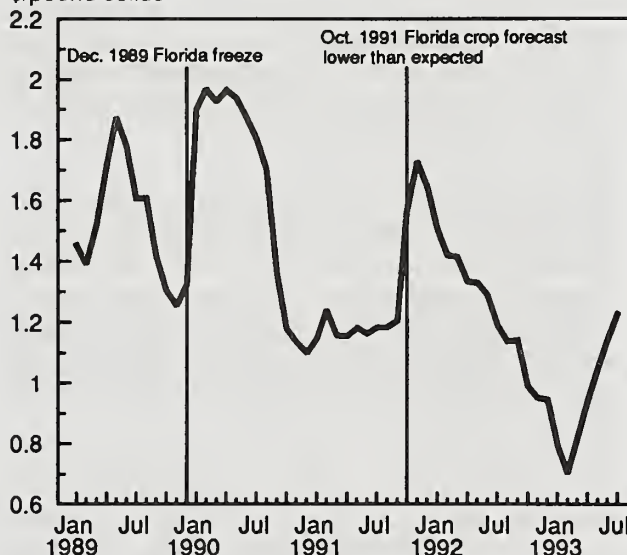


Table 18--Brazilian orange juice: Supply and utilization, 1985/86-1993/94

Season 1/	Beginning stocks	Production	Exports	Domestic consumption	Ending stocks 2/
-- Million SSE gallons 3/ --					
1985/86	62	1,230	987	21	284
1986/87	284	848	983	28	121
1987/88	121	998	1,038	28	53
1988/89	53	1,002	994	28	34
1989/90	34	1,476	1,348	28	134
1990/91	134	1,213	1,142	28	177
1991/92	177	1,334	1,390	25	96
1992/93	96	1,589	1,448	25	211
1993/94 4/	211	1,434	1,504	25	115

1/ Season begins in July of the first year shown. 2/ Data may not add due to rounding. 3/ SSE = Single-strength equivalent. 4/ Forecast, August 1993.

Source: Foreign Agricultural Service, USDA.

Grapefruit Prices for Growers Lowest in 10 Years

Growers harvested a record grapefruit crop in Florida. A slow start marked early-season shipments because of later-than-normal maturity. U.S. monthly grower prices for grapefruit have been well below a year earlier.

U.S. grapefruit production is expected to total 2.8 million short tons in 1992/93, an increase of 26 percent from 1991/92. Florida's crop is expected to total 2.3 million tons, 30 percent larger than in 1991/92. California's projected grapefruit production of 313,000 tons is 5 percent less than in 1991/92, due to a production decline from a record crop the previous year in the State's "other areas".

The 1992/93 grapefruit crop in Arizona will likely total 70,000 tons, down 21 percent. Texas harvested a 72,000 ton crop, the largest since the December 1989 freeze that severely damaged citrus trees and temporarily shut down the State's grapefruit industry.

In Florida, grapefruit shipments started more slowly at the beginning of the 1992/93 season than in the previous 2 years because of later, but more normal, fruit maturity. However, monthly shipments picked up and surpassed February and March of 1992. Cumulative domestic shipments of fresh-market grapefruit, as of July 10, 1993, were 3 percent more than the same date in the prior season.

The mid-March storm system that affected much of the East Coast had a minimal impact on Florida's 1992/93 grapefruit crop. Cold temperatures and high winds caused some fruit loss, but it is likely that most fruit that dropped would not have been harvested anyway because of low grower prices.

In part because of the large crop, U.S.-average grower prices for all grapefruit in 1993 fell to levels last seen in the early 1980's. March 1993 grapefruit prices averaged nearly 80 percent less than in 1992. The March on-tree price for Florida's fresh grapefruit was \$2.86 a box, down about 70 percent from a year earlier. The processed grapefruit price was nearly 90 percent less than in March 1992. Retail prices during the first 6 months of 1993 averaged 48.4 cents per pound, down 14 percent from a year earlier.

A second factor weighing on prices in 1992/93 has been weaker foreign demand. Reduced export demand led to lower grapefruit exports than would be expected, given a large Florida crop and lower prices. Grapefruit exports to Japan, the largest U.S. export market, were 201,524 short tons from September 1992 through May 1993, down 19 percent from a year earlier.

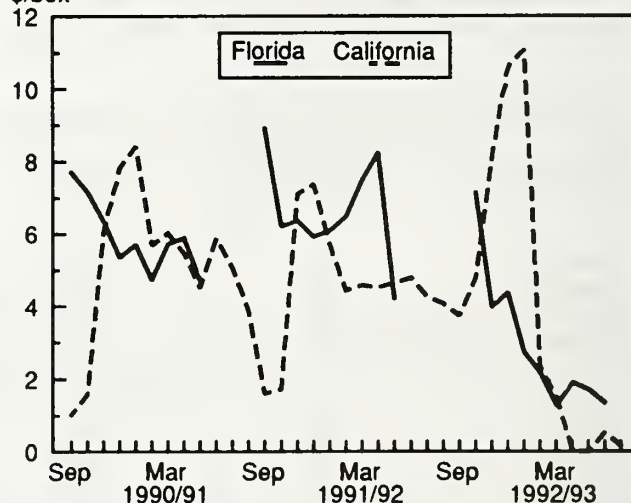
More Grapefruit Processed in 1992/93

About 63 percent more grapefruit had been processed in Florida by July 10, 1993, than at the same time a year earlier. The large crop and lower fresh-market grapefruit prices contributed to more processed use.

With Florida supplies of frozen concentrated grapefruit juice 28 percent higher in 1992/93 than a year earlier, and movement only 4 percent higher, carryover stocks are expected to be 11.1 million gallon (40 degrees Brix), the third highest on record. Expected carryover stocks represent a sufficient supply for almost 5 months, more than twice 1991/92 levels.

Figure 28

All Grapefruit: Equivalent On-Tree Returns \$/box



Less Almond Production and More Walnuts Forecast

California almond output is forecast down 14 percent from the 1992 crop. Low ending stocks and output will keep almond prices up in 1993. A 23-percent increase in walnut production will replenish supplies and lower prices.

Tighter Almond Supplies To Bolster Prices

The July forecast of California's 1993 almond crop was 470 million pounds (shelled basis), 14 percent less than the 1992 California almond crop. Nut sets were lighter than originally anticipated, but nut quality is still expected to be excellent, with sizes slightly larger than normal. Rains and cool weather in May and June slowed crop development, dropping maturity about 1 week behind normal. Tight supply and excellent quality will keep almond prices high in 1993/94.

Ending stocks of almonds were at a 5-year low at the end of the 1992/93 season. The 1992 California almond crop of 548 million pounds was up 12 percent from 1991, but 5 percent under the 5-year average. Exports were strong in 1992 and beginning stocks had been low from the small 1991 crop. Grower prices for the 1992 almond crop averaged \$1.26, up 6 percent from the prior year, and the highest since 1986. The combination of a large crop and higher prices brought the value of 1992 almond production up 19 percent from 1991 to a record \$670 million.

If the forecast is realized, 1993 California almond production would be the lowest in 6 years. Extremely low beginning stocks, coupled with a 14-percent drop in production and excellent nut quality, will push prices higher in 1993.

Increased Walnut Output To Ease Tight Supplies

California production of English walnuts is expected to be up 23 percent in 1993, to 250,000 short tons (in-shell). Production of all varieties is expected to exceed last year, and prices are likely to be down despite low beginning stocks. Growers were concerned about blight following the June rains, as well as reduced quality from codling moths, but July reports indicated no significant quality problems.

U.S. walnut supplies were at a 5-year low in 1992, with California production down to 203,000 tons from a record-large 1991 crop. Grower prices for 1992 California walnuts were record high, averaging \$1,320 per ton, up 25

percent from 1991. However, the effect of less output outweighed higher prices, and the value of 1992 California walnut production was \$268 million, 2 percent less than in 1991.

Record-High Hazelnut and Pistachio Crops in 1992

Hazelnut production was record-high in 1992, 27,700 tons (in-shell), and much lower prices brought the value of production down 17 percent from 1991. California pistachio production was a record-breaking 147 million pounds (in-shell) in 1992, an on-year of the alternate-year bearing cycle. Although pistachio prices were down from the prior year, strong export demand kept prices higher than usual for an on-year-size crop. The value of 1992 pistachio production rose to an all-time high of \$151.4 million.

Macadamia nut production in Hawaii was down for the third consecutive year in 1992. Bearing acreage was down for the second year due primarily to "macadamia quick decline." The 1992 grower price was down slightly from 1991, so the overall value of macadamia production dropped 6 percent.

Tree Nut Consumption Up in 1992

U.S. consumption of all tree nuts rose slightly to 2.4 pounds per capita (shelled basis) in 1992. Consumption of pecans and walnuts was down from a year earlier, but almond consumption remained nearly the same and 30 percent of all tree nut consumption. A much larger U.S. pistachio crop and increased cashew imports raised the total tree-nut-consumption estimate.

U.S. pecan production in 1992 was down 44 percent from the year earlier and 19 percent less than in 1990. Adverse weather in the fall of 1991 and spring of 1992 reduced pecan production in many Southeastern States. In Georgia, often the leading pecan-producing State, pecan output was less than one-third of 1991 production. Imports, mainly from Mexico, rose 50 percent in 1992. However, imports did not offset the drop in U.S. production, consequently consumption fell 20 percent.

Table 19--Tree nuts: Supply and utilization, by commodity and marketing year, 1987/88-1992/93 preliminary

Commodity	Marketing year 1/	Marketable production	Imports	Beginning stocks	Market reserve 3/	Total supply	Ending stocks	Exports	Domestic consumption	
									Total	Per
										capita
--1,000 pounds (shelled)--										Pounds
Almonds	1987/88	634,560	650	79,017	114,220	714,227	227,894	343,300	143,033	0.59
	1988/89	564,540	480	227,894	141,130	792,914	265,206	363,970	163,738	0.66
	1989/90	457,170	247	265,206	0	722,623	203,100	342,380	177,143	0.71
	1990/91	615,700	132	203,100	43,100	818,932	241,360	359,950	217,622	0.87
	1991/92	461,632	204	241,360	1,260	703,196	140,000	377,879	185,317	0.73
	1992/93p	518,607	284	140,000	0	658,891	118,000	349,851	191,040	0.74
Hazelnuts	1987/88	17,218	3,863	1,139	0	22,220	1,758	5,898	14,564	0.06
	1988/89	12,693	8,165	1,758	0	22,615	1,686	3,778	17,152	0.07
	1989/90	9,794	7,157	1,686	0	18,637	1,107	3,344	14,186	0.06
	1990/91	13,668	10,116	1,107	0	24,892	2,977	4,726	17,188	0.07
	1991/92	18,923	6,172	2,977	0	28,072	6,601	7,135	14,336	0.06
	1992/93p	21,134	8,201	6,601	0	35,935	7,000	12,793	16,143	0.06
Pecans	1987/88	121,136	12,966	63,423	0	197,525	62,520	3,935	131,071	0.54
	1988/89	135,030	2,718	62,520	0	200,267	70,785	5,885	123,598	0.50
	1989/90	101,989	9,990	70,785	0	182,764	58,260	9,509	114,995	0.46
	1990/91	97,530	30,494	58,260	0	186,284	45,892	17,793	122,600	0.49
	1991/92	118,933	18,725	45,892	0	183,550	50,327	17,216	116,007	0.46
	1992/93p	74,147	28,241	50,327	0	152,714	41,870	15,882	94,963	0.37
Walnuts	1987/88	204,292	470	28,343	0	233,105	59,954	59,243	113,908	0.47
	1988/89	169,916	184	59,954	0	230,054	48,231	60,263	121,560	0.49
	1989/90	195,594	142	48,231	0	243,967	54,196	66,896	122,876	0.49
	1990/91	180,800	95	54,196	0	235,091	48,736	63,902	122,452	0.49
	1991/92	210,436	82	48,736	0	259,254	55,689	72,386	131,179	0.52
	1992/93p	163,319	4,073	55,689	0	223,081	47,000	57,362	118,719	0.46
Macadamias	1987/88	9,522	2,090	0	0	11,612	0	632	10,980	0.05
	1988/89	11,193	2,503	0	0	13,696	0	1,259	12,437	0.05
	1989/90	11,918	3,760	0	0	15,678	0	3,000	12,678	0.05
	1990/91	11,700	5,162	0	0	16,862	0	4,000	12,862	0.05
	1991/92	11,880	2,942	0	0	14,822	0	5,000	9,822	0.04
	1992/93p	11,280	4,732	0	0	16,012	0	5,000	11,012	0.04
Pistachios	1987/88	14,579	2,166	15,005	0	31,750	5,487	3,469	22,794	0.09
	1988/89	44,752	854	5,487	0	51,093	14,897	6,442	29,754	0.12
	1989/90	18,029	2,124	14,897	0	35,051	10,045	5,164	19,842	0.08
	1990/91	42,047	852	10,045	0	52,944	16,864	9,575	26,505	0.11
	1991/92	25,476	250	16,864	0	42,590	6,072	16,407	20,110	0.08
	1992/93p	65,362	247	6,072	0	71,681	10,025	28,481	33,175	0.13
Other Nuts 4/	1987/88	0	110,239	0	0	110,239	0	9,800	100,439	0.41
	1988/89	0	111,838	0	0	111,838	0	13,876	97,962	0.40
	1989/90	0	146,409	0	0	146,409	0	19,211	127,198	0.51
	1990/91	0	151,549	0	0	151,549	0	25,429	126,120	0.50
	1991/92	0	142,693	0	0	142,693	0	31,758	110,935	0.44
	1992/93p	0	178,093	0	0	178,093	0	25,809	152,284	0.59
Total Nuts	1987/88	1,001,307	132,444	186,927	114,220	1,320,678	357,612	426,277	536,789	2.20
	1988/89	938,124	126,742	357,612	141,130	1,422,478	400,806	455,472	566,200	2.30
	1989/90	794,495	169,828	400,806	0	1,365,129	326,708	449,504	588,917	2.37
	1990/91	961,446	198,400	326,708	43,100	1,486,554	355,829	485,376	645,349	2.57
	1991/92	847,280	171,067	355,829	1,260	1,374,176	258,689	527,781	587,706	2.31
	1992/93p	853,848	223,870	258,689	0	1,336,407	223,895	495,177	617,335	2.40

1/ Marketing season begins July 1 for almonds, hazelnuts, macadamias, pecans, and other nuts; August 1 for walnuts; and September 1 for pistachios. 2/ Marketable production is used to calculate consumption, which excludes inedibles and noncommercial useage. 3/ Market reserve allocated to domestic consumption, export or ending stocks. 4/ Includes Brazil nuts, cashew nuts, pignolias (Chinese pine nuts), chestnuts, and mixed nuts.

Source: Economic Research Service, USDA.

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